Microsoft Dynamics CRM 4.0 User's Guide

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Chapter 1: Getting Started

This chapter deals with common tasks that are necessary to understand before beginning to use *Microsoft Dynamics CRM*.

Common Tasks

Getting Started and Finding Help

Introduction to Microsoft Dynamics CRM

Welcome to Microsoft Dynamics CRM

Microsoft Dynamics CRM is designed to help your organization acquire and retain customers and reduce the time spent on administrative tasks. At its core, Microsoft Dynamics CRM provides a robust account management system that automatically tracks activities and revenue. Microsoft Dynamics CRM enables you to perform and automate many common business tasks, including:

- Easily access information about business records from one place.
- Schedule activities, track them, and send e-mail.
- Generate reports.
- Manage marketing lists.
- Track advertising and marketing campaigns.
- Sort customer responses to your sales and marketing initiatives.
- Keep detailed notes and an activity history for each business record.
- Microsoft Dynamics CRM also can run from within Microsoft Office Outlook.

Sales Force Automation

Sales departments can use Sales Force Automation to track sales-related activities and revenue. This system includes analytical, operational, and collaborative tools that you can use to improve and maintain good customer relations. Using Sales Force Automation, you can:

- Qualify leads.
- Manage contacts and accounts.
- Track quotes, orders, and invoices.
- Manage and track e-mail, phone call, and other communication activities with customers.
- Run direct e-mail campaigns and measure their success.
- Create and access a database of products that your organization sells.

Marketing Automation

Marketing departments can use Marketing Automation to manage many marketing-related activities. Using Marketing Automation, you can:

- Create targeted marketing lists.
- Plan and run campaigns.
- Track each campaign response and lead generated from campaigns.

Customer Service Management

The Customer Service area is designed specifically to meet the needs of customer support and product support departments that handle telephone, e-mail, and Web-based service requests from customers. Using the Customer Service area, you can:

- Track individual cases and manage services.
- Track and share common problems and solutions in a knowledge base.
- Manage customer contracts.

Appointment-based Service Scheduling

Customer service representatives can manage service activities for your business. Using Service Scheduling, you can:

- Define the services you offer.
- Identify available resources and equipment for service activities.
- Define work schedules for individual resources, as well as their locations.

Reporting and Analysis

Microsoft Dynamics CRM includes several features to help you generate reports and analyze data:

- Run a default report.
- Create an Advanced Find query to find a filtered set of records and then export the list for analysis.
- Create a custom report using Microsoft SQL Server Reporting Services or other reporting tools.

Customization

System administrators can adapt Microsoft Dynamics CRM to fit the needs of their business organizations. Using the customization capabilities of Microsoft Dynamics CRM, you can:

- Create new Microsoft Dynamics CRM entities, attributes, and application forms without custom programming.
- Customize forms and views for enhanced integration with other Web applications, portals, and business systems.
- Apply form validation and add client-side business logic through scripting.

Workflow

Beyond the business automation included in Microsoft Dynamics CRM, you can use additional workflows to further automate your organization's business logic. Then you can make your workflows available as an on-demand workflow or automatic workflow.

Microsoft Dynamics CRM for Microsoft Office Outlook

Microsoft Dynamics CRM for Outlook is a client application that provides the Sales Force Automation functionality of Microsoft Dynamics CRM within Outlook. When you run Microsoft Dynamics CRM for Outlook, you can work either in online or offline mode.

Find Answers

You can find information by using Help, the Resource Center, and Documentation Feedback.

Help

Help provides conceptual overviews for each area and step-by-step procedures for tasks. Help topics may reference things that are unavailable or may differ from the Microsoft Dynamics CRM user interface for the following reasons:

- Functionality depends on a user's security role. Some Microsoft Dynamics CRM lists, forms, and options are not available to all users. Help topics for restricted areas are marked with .
- If your organization has created a new record type or customized existing record types, Help will not match the changes. For instructions about customizing help, see Customizing Help (Microsoft Dynamics CRM SDK).

Help is updated periodically. You are currently reading Microsoft Dynamics CRM Help 4.1. To check to see if a more recent update is available, on the Microsoft Dynamics CRM **Help** menu, click **Help Updates**. You also can sign-up to receive notification of updates to Microsoft Dynamics CRM, including Help updates. More information: Manage Administration Settings

Resource Center

The Resource Center provides articles explaining how to do common tasks, and includes links to the Microsoft Dynamics CRM community newsgroups, blogs, and trainings. The Resource Center is updated regularly.

Documentation Feedback

The documentation team wants to make it easy for you to find answers. In every Help topic, you can rate whether it was helpful and tell us what you were looking for.

All feedback must be in English. Your feedback will be used to make improvements to the Help and shape the content delivered to the Resource Center.

Accessibility for People with Disabilities

Microsoft is committed to making its products and services easier for everyone to use. Microsoft Dynamics CRM offers assistance through keyboard shortcuts to address issues faced by people with limited dexterity or motion disabilities.

If you are using High Contrast settings in either your browser or operating systems, you should also set the High Contrast option in your personal options.

More information: Set Personal Options

Note

For more information about features, products, and services that make Microsoft products more accessible for all users, on the **Start** menu, click **Help and Support**, and then click **Accessibility**.

Welcome to the Resource Center

The Resource Center brings together information that will help you get the most from your use of Microsoft Dynamics CRM. The Resource Center provides a central location where you can find:

- Information to help you get started.
- Tips to make you more productive.
- In-depth descriptions of product features and recommendations for using them to build your business.
- Examples and advice from subject matter experts.
- Easy access to other online resources related to Microsoft Dynamics CRM.
- Search tools that help you find information related to Microsoft Dynamics CRM within the Resource Center and on other resources available on the web.

Information in the Resource Center is regularly updated and organized to help you quickly find the information you need.

- The **Highlights** page shows you new content or content that has been highly rated.
- The **Sales** page groups information that will be of interest to salespeople, sales managers, and executives focused on using Microsoft Dynamics CRM to increase sales.
- The **Marketing** page focuses on information that shows how to identify and qualify leads using Microsoft Dynamics CRM.
- The **Service** page provides insight about how you can use Microsoft Dynamics CRM to provide superior customer service and manage the services you provide.
- The **Settings** page is where you will find more technical information about configuring and customizing Microsoft Dynamics CRM to support all aspects or your business.

Use Keyboard Shortcuts

The shortcut keys described in this section refer to the U.S. keyboard layout. Keys on other layouts might not correspond exactly to the keys on a U.S. keyboard.

▸ General keyboard shortcuts

To	Press
Copy text.	CTRL+C
Paste text.	CTRL+V
Undo previous text change.	CTRL+Z
Save a record.	CTRL+S
Close a record.	CTRL+F4
Cut text.	CTRL+X
Delete text.	DELETE
Delete selected text immediately without putting it on the Clipboard.	SHIFT+DELETE

Move the insertion point to the start of the next word.	CTRL+RIGHT ARROW
Move the insertion point to the start of the previous word.	CTRL+LEFT ARROW
Select all text in the current field.	CTRL+A
Display the System menu for the active window.	ALT+SPACEBAR
Move forward through the form's fields.	TAB
Move backward through the form's fields.	SHIFT+TAB
Display the shortcut menu for the selected item.	SHIFT+F10
Display the corresponding menu.	ALT+the key for the underlined letter in the menu name.
Cancel the current task or command, or close a selected list or dialog box.	ESC
Move up through a list of records.	UP ARROW
Move down through a list of records.	DOWN ARROW
Expand or collapse the preview in a list view.	SPACEBAR
Open the selected record.	ENTER
Select all records on the current page.	CTRL+A

▸ Dialog box keyboard shortcuts

To	Press
Move to the next option or option group.	TAB
Move to the previous option or option group.	SHIFT+TAB
Complete the command for the active option or button.	ENTER
Move between options in an open list, or between options in a group of options.	ARROW keys
Cancel a command, or close a selected list or dialog box.	ESC

Form keyboard shortcuts

To	Press
Save.	CTRL+S or SHIFT+F12
Save and close.	ALT+S
Expand or collapse Form Assistant.	CTRL+SHIFT+F
Cancel edits and close (Close).	ESC
Delete the record.	CTRL+D
Save and then open a new form (Save and New).	CTRL+SHIFT+S

Accessibility keyboard shortcuts

In a computer running on Microsoft Windows, you can set system accessibility options to change the way

you work. For example, you can use Windows Sticky Keys if you have difficulty holding down two or more keys at a time, such as CTRL+P. Sticky Keys enable you to press the CTRL key and have it remain active until you press the P.

To	Press
Switch Sticky Keys on and off.	SHIFT five times
Switch Filter Keys on and off.	RIGHT SHIFT for eight seconds
Switch Toggle Keys on and off.	NUM LOCK for five seconds
Switch High Contrast on and off.	LEFT ALT+LEFT SHIFT+PRINT SCREEN
Switch Mouse Keys on and off.	LEFT ALT+LEFT SHIFT+NUM LOCK

Managing Records

Find Things

There are several ways to locate a specific record when you're working with a list of records, or when you're filling out a form. With Advanced Find, you can also save your search as a saved view to use again later.

Find records in a list

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

- Use one of the following methods to find records in a list:

▸ *Filter a list*

Select a view from the **View** drop-down list at the top of any list of records. Some lists, such as **Activities** and **History**, provide additional choices to help filter a list.

The **View** list includes two types of views: System Views and My Views.

▸ *Search for a text string*

In the **Search for records** box, type a few letters to narrow your search, and then click the **Lookup**

button .

Use an asterisk (*) as a wildcard if the text you're looking for is not at the beginning of a field. For example, to find all records that contain the word "advanced" in the searched columns, enter ***advanced**.

Important The search is not related to the view currently selected in the **View** menu. Only active records are returned.

Tip

For each record type, which fields are searched can be customized. By default, the following fields are searched:

- Account: Account Name, Account Number, E-mail
- Activity and individual activity types including Appointment, E-mail, Letter, Fax, and Phone Call: Subject
- Campaign: Campaign Code, Name
- Case: Title, Case Number
- Contact: Full Name, First Name, Middle Name, Last Name, E-mail, Case Number
- Contract: Contract Name
- Lead: Company Name, First Name, Last Name, Name, Topic
- Marketing List: Name
- Opportunity: Topic
- Quote, Order, Invoice: Name
- Product: Product Name, ID
- Sales Literature: Title

More information: Work with Entities.

Sort a list

- To sort a list of records, click a column heading. To reverse the sort order, click the column heading again.

  An arrow icon in the column heading shows that the list is sorted: the **Ascending Sort** icon indicates ascending, and the **Descending Sort** icon indicates descending.

- To sort by an additional column, press SHIFT while you click the additional column heading.

You cannot sort by columns that display data from a related record type.

Use Advanced Find to filter the list

1. To start an Advanced Find search:
   In the **View** box, select the view that is closest to what you want, and then on the Standard toolbar, click **Advanced Find**.
   - OR -

On the Actions toolbar, click **Advanced Find**.

2. Specify criteria for your search and the columns to display.
   More information: Work with Advanced Find

Create your own view

1. To start an Advanced Find search:
   In the **View** box, select the view that is closest to what you want, and then on the Standard toolbar, click **Advanced Find**.
   - OR -
   On the Actions toolbar, click **Advanced Find**.
2. Specify criteria for your search and the columns to display.
   More information: Work with Advanced Find
3. Click **Save As**.
4. In the **Query Properties** dialog box, in the **Name** field, type a name for the search.
5. In the **Description** box, type a brief description, and then click **OK**.

   The search is saved as a view and appears on the **Saved Views** tab of the Advanced Find form. This new view is also available from the list page for the record type in the **View** box, in the **My Views** section.

Go to the next page of records

If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.

Use the alphabetical index

For lists that include an Index at the bottom of the list:

- To view records with the information in the sorted column that begin with a specific letter, click the letter.
- To view records with the information in the sorted column that begin with 0-9, click **#**.
- To view all records, click **All**.

Tips

- To make sure a list of records is current, at the top of the list, click the **Refresh** button , or right-click any record and then click **Refresh list**.
- To preview a record, click the **Preview** button next to the record. To close the preview, click the **Close Preview** button .
- To see the exact criteria used for any saved view and most system views, select the view, on the Standard toolbar click **Advanced Find**, and then click **Show Details**.
- It is not possible to find or retrieve deleted records.

- In any list, select multiple records:
  - Select several records by pressing the CTRL key while you click each record.
  - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
  - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.
- By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:
  1. On the **Tools** menu, click **Options**.
  2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
  3. Click **OK**.

  This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

Find records while filling out a form

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

- When you fill out a form and need to select a record in a field, you can use the **Lookup** button , or in some forms, you also can use the Form Assistant pane.

▸ *Use the Lookup button*

1. Click the **Lookup** button .
2. In the **Look for** box, if needed, select a record type, enter some letters to search for, and then click the **Find** button .
3. Select the record, click the **Add Selected Records** button , and then click **OK**.
4. In the **Advanced Find** page, click **Find**.

– OR –

Use the Form Assistant pane:

- To show or hide the Form Assistant pane, in the title bar of the pane, click the **Expand** button or **Collapse** button .
- To collapse or expand an individual section, in the title bar of the section, click the **Collapse** button or the **Expand** button .

- To select a record:
  1. Put the insertion point in the text box for which you want to search for a record.
     If a suggestion is available, the Form Assistant pane filters and displays the appropriate records.
  2. In the Form Assistant pane, click a record.
     The appropriate data fills the text box.
- To create follow-up activities related to the open record:
  1. From an open record, on the Actions toolbar, click **Follow Up** .
     The Form Assistant pane displays a partially completed activity.
  2. Select the activity type.
     You cannot create a follow up task activity for an e-mail activity created with a quick campaign. Select a phone call, letter, fax, e-mail or appointment activity.
  3. Complete the required fields.
  4. Click **Save** or **Save and Open**.

Create, edit, or save an Advanced Find search

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. On the Standard toolbar, click **Advanced Find**.

   Tip: Advanced Find starts with criteria based on where you are in Microsoft Dynamics CRM. If you click **Advanced Find** from a view, the criteria for that view will be preloaded for you.

   – OR –

   To edit a saved search, on the Standard toolbar, click **Advanced Find**, click the **Saved Views** tab, and then double-click the saved view.

2. Specify the search criteria.
   - If **Show Details** is visible in the criteria toolbar, click it.

     a. Specify what to search for

     b. In the **Look for** list, select the type of record you want to search for, such as **Accounts**, **Leads**, or **Users**.

     c. Click **Select** to select criteria for the search, including the field to search on (for example, **Account Name** or **City**), the query relational operator, and the values to locate (for example, "Seattle" or "E-mail").
     You can select fields from the current record type, or from related records.

   - For some values, you can click the **Lookup** button to open the **Select Values** dialog box and select the value you want.

At the bottom of the **Select** list, the **Related** section shows related record types are. When you select a related record type, a new **Select** link appears to select fields from this related record type.

Clear, delete, or group search criteria clauses

- Clear all search criteria to start over.
  a. Click **Clear** to remove all criteria.
  b. In the confirmation message, click **OK**.
- Delete a row of search criteria.
  . Click the **Options menu** button ▼ next to a search criteria row, and then click Delete.
  a. In the confirmation message, click **OK**.
- Group criteria.
  . Click the **Options menu** button ▼ next to a search criteria row, and then click **Select Row**.
  To group search criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify search criteria for these fields can be grouped. However, rows with field values from **Account** and **Opportunity** record types cannot be grouped.
  a. On the Filter toolbar, select **Group AND** or **Group OR**.
  b. Repeat steps a and b to create additional criteria groups.
- Select and deselect grouped criteria.
  . Click the **Options menu** button ▼ next to a search criteria row that has been selected, and then click **Deselect Row**. You can unselect rows from a group or individually.
  a. Click the **Options menu** button ▼ next to the group, and then click **Select Group** to select a group, or click **Deselect Group** to unselect a group that has been previously selected.
- Add a search criteria clause to a criteria group.
  . Click the **Options menu** button ▼ next to the group, and then click Add Clause.
  a. Add search criteria to the new clause.
- Ungroup rows of criteria that you have grouped together using **Group AND** or **Group OR**.
  . Click the **Options menu** button ▼ next to the group you want to ungroup, and then click **Ungroup**.
  a. Repeat this step to ungroup additional search criteria groups.
- Change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group.
  . Click the **Options menu** button ▼ next to the group, and then click **Change to OR** or **Change to AND**.
  a. Repeat this step to change additional search criteria groups.
- Hide or delete a row in Simple view:
  . To hide a row, click the **Options menu** button ▼ next to a search criteria row, and then click **Hide in Simple Mode**.
  a. To make a hidden row visible, click **Show in Simple Mode**

Specify the columns to include in the search results.

. Click **Edit Columns**, and then click **Add Columns**.

a. Select the record type that includes the columns you want to add.

b. Select the check box next to the columns you want to add. If a column isn't listed, contact your system administrator.

c. Click **OK**.

d. The following options are also available:

- To adjust the width of a column, click the column, click **Change Properties**, select a width, and then click **OK**.
- To reorder columns, select a column, and use the arrow keys to move it to the left or right.
- To remove a column, select it, and then click **Remove**.

e. Click **OK**.

Specify the sort order.

. Click **Edit Columns**, click **Configure Sorting**, and specify the column to sort on, and the sort order.
Tip: Each view is sorted by only one column. However, after you click Find, you can sort by additional columns. To sort a search results list by an additional column, press SHIFT while you click the additional column header.
You can only sort on columns from the primary record type.

f) Save the search as a saved view.

a. If you're saving an existing saved view, click **Save**. If you are saving a new view or want to change the name of the view because you changed the criteria, click **Save As**.

b. In the **Query Properties** dialog box, in the **Name** field, type a name for the search.

c. In the **Description** box, type a brief description, and then click **OK**.

The search is saved as a view and appears on the **Saved Views** tab of the Advanced Find form. This new view is also available from the list page for the record type in the **View** box, in the **My Views** section.

Click **Find**. The selected records are displayed.

Click **Back to Query** to return to the **Find** tab.

Tips

- When you specify search criteria to find activity records, you can either search through all types of activities or select one type of activity to search, such as Task or Appointment.
- The columns that are displayed by default are controlled by the Advanced Find View for the record type. More information: Work with Entities.
- If you need to search based on the names of people who participated in an activity, in the Advanced Find criteria, you must search fields in the related activity party. You can search based on the person's name (**Party** field), or by their role in the activity, such as sender or recipient (**Participation Type** field).

  For example, to find e-mail messages sent to a specific contact:

a. In the Activities list, in the **Type** box, select **E-mail**.

b. Click **Advanced Find**, and then click **Show Details**.

c. Click **Select**, and then in the **Related** section, select **Activity Parties (Activity)**.

d. Under **Activity Parties (Activity)**, click **Select**.

e. In the **Fields** section, click **Participation Type**, click **Enter Value**, and then click the **Select Values** button .

f. In the **Available Values** list, select **To Recipient**, click the **Add Selected Records** button , and then click **OK**.

g. Under **Activity Parties (Activity)**, click **Select**.

h. In the **Fields** section, click **Party**.

i. Click the **Equals Current User** operator, and change it to **Equals**.

j. Click **Enter Value**, and then click the **Lookup** button .

k. In the **Look for** box, select **Contact**, enter some letters to search for, and then click **Start search**.

l. Select the contact, click the **Add Selected Records** button , and then click **OK**.

m. In the **Advanced Find** page, click **Find**.

Note

You cannot use Advanced Find to find records related to quick campaigns.

Working with saved Advanced Find searches

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

- You can run, share, assign, delete, or deactivate a saved view that you own.

  If another user has shared a saved view with you, what you can do will depend on the specific privileges they have given to you: Share, Assign, Delete, or Write.

Run a saved search

On any list page in the **View** box, in the **My Views** section, select a saved view.
If there is not a **My Views** section, there are no saved searches for this record type.

– OR –

On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab. Double-click a saved search, and then click **Find**.

Share a saved search

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.

2. Select the view. On the Actions toolbar, click **More Actions**, and then click **Sharing**.
3. In the sharing dialog box, under **Common Tasks**, click **Add User/Team**.
4. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
5. In the **Search for records** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .
6. In the list of available records, click a user or team to select it, and then click the **Add Selected Records** button to add the user or team to the **Selected records** list.
7. Click **OK**.
8. In the sharing dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.
9. Click **OK**.
   The saved view will show up in the **My Views** section of your coworker's **View** list.

Tips

- To cancel any changes that you have made and retain the previous permissions settings, click **Reset**.
- To select or clear all permissions on a selected item, click **Toggle All Permissions of the Selected Items**.

Assign a saved search

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the Actions toolbar, click the **Assign** button .
3. In the **Assign** dialog box, click:
   - **Assign to me**
     Use this option to assign the record to yourself.

     – OR –

   - **Assign to another user**

     Click the **Lookup** button , type a part of the user's name, click the **Find** button , double-click the user's name, and then to close **Look Up Records** dialog box, click **OK**.
4. Click **OK**.

Deactivate a saved search

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the **More Actions** menu, click **Deactivate**.

Delete a saved search

3. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
4. Select the view, and then on the Actions toolbar, click the **Delete** button .

E-mail or copy a link to a saved search

Send a shortcut in an e-mail

1. On the Actions toolbar, click **Send Shortcut**, and then click **Of Current View**.
2. Complete the e-mail form and send.

Copy a shortcut

3. On the Actions toolbar, click **Copy Shortcut**, and then click **Of Current View**.
4. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V.

More information: Send or Copy a Shortcut

Delete Things

Caution Once you delete a record, it cannot be retrieved.

Typically you should only delete records that you entered by mistake. For some record types, you can deactivate or close the record instead. Not all record types can be deleted. For details, select **Special cases**.

Delete records

Can I do this task?

If the **Delete** button is not visible on the toolbar, the security role assigned to your account does not have permission to delete this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

If you are deleting a record that has child records, you can delete it only if you also have permission to delete any child records.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. In any list of records, select the record that you want to delete.

   – OR –

   In any list, select multiple records:

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.

- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

Tip

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click the **Delete** button .

If you are deleting accounts or contacts, you have the option to deactivate the record instead of deleting it. In the **Delete Confirmation** dialog box, to delete the record, click **Delete**, or to deactivate it, click **Deactivate**.
For other record types, in the **Confirm Deletion** dialog box, click **OK**.

Notes

- When you delete a record, all its relationships to other records are also deleted.
- If the record has child records, and you have permission to delete the child records, the child records will also be deleted.

Special Cases

Record Type	Notes	More Information
Accounts	Can also be deactivated.	Work with Accounts
Activities in Queues	When you delete an e-mail message in a queue, it is removed from the queue, but is not deleted as an active activity. To delete it, you must delete it from the Activities list. When you delete other activity types from a queue, the activity record is deleted both from the queue and from	Work with Queues

	Microsoft Dynamics CRM.	
Business Units	Can be deactivated, but not deleted.	Work with Business Units
Cases	Can also be canceled.	Work with Cases
Contacts	Can also be deactivated.	Work with Contacts
Knowledge Base Articles	Articles must be unpublished from the knowledge base before being deleted.	Work with Articles
Invoices	Canceled or completed invoices cannot be deleted. Completed invoices can be canceled.	Work with Invoices
Leads	Can also be disqualified.	Work with Leads
Marketing Lists	Can also be deactivated.	Work with Marketing Lists
Orders	Only active orders can be deleted. As an alternative, orders can be canceled.	Work with Orders
Opportunities	Can also be closed.	Work with Opportunities
Price Lists	Can also be deactivated.	Work with Price Lists
Products	Can only be deleted from the product catalog in the Settings area.	Work with Products

Quick Campaigns	Deleting a quick campaign record deletes all of the activities created by the quick campaign, even if those activities were not yet complete.	Work with Quick Campaigns
Quotes	Only draft quotes can be deleted. You can select Revise on the Actions menu to return an active quote to draft status.	Work with Quotes
Services	Can be deactivated, but not deleted.	Work with Services
Teams	Can remove members, but cannot delete or deactivate.	Work with Teams
Users	Can be deactivated, but not deleted.	Manage a User's Record

Remove an attached file

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the record that you want.
2. For most record types, click the **Notes** tab.
   - On the E-mail form, click the **Attachments** tab.
   - On the Service Activity form, click the **Service Activity** tab.
   - On the Case form, click the **Notes and Article** tab.
3. Double-click the status row of the note that contains the attachment you want to remove.
4. To keep the note, but remove the attachment, in the **Note** form, in the **File Attachment** area, click **Remove**, click **OK**, and then click **OK** again.

   – OR –

   To remove the note and the attachment, on the **Actions** menu, click **Delete Note**, and then click **OK**.
5. Click **Save** or **Save and Close**.

Note

You cannot update an attached file. Instead, save the file on your computer and edit the file, delete the attachment, and then attach the edited file.

Print Things

Print the details of a record

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the list of records, open the record that you want.
2. On the Actions toolbar, click the **Print** button .
3. In the **Preview** form, click **Print**.
4. In the **Print** dialog box, select the print options you want, and then click **Print**.
5. On the Standard toolbar of the **Preview** form, click **Close**.

Note

To print a note, open the record, click the **Notes** tab, right-click the note that you want, and then click **Print**.

Print a list of records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. On the Actions toolbar, click the **Print** button .
2. If the records in the list extend beyond the current view, you will see the **Print List** dialog box.
   To print a list that is limited to the items listed on the current page, click **All records on current page**, and then click **OK**.

   – OR –

   To print a list of all items that are on all pages for that view, click **All records on all pages**, and then click **OK**.
3. In the **Preview** form, click **Print**.
4. In the **Print** dialog box, select the print options you want, and then click **Print**.
5. On the Standard toolbar of the **Preview** form, click **Close**.

Tips

- By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

  1. On the **Tools** menu, click **Options**.
  2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
  3. Click **OK**.

  This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

- If you need to print other columns than the ones in the list, use Advanced Find to create a new view that includes all the columns you need. More information: Work with Advanced Find
- If you want to format the list before printing it, export the list to Microsoft Office Excel, and format it there. More information: Export Data to Excel
- When you print a list, a title describing the list is not included. If you need a title on your printout, export the list to Microsoft Office Excel, add a title, and then print the worksheet.

Print the details of an activity from a calendar

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can print the details of an appointment or service activity from the Workplace calendar or the Service calendar.

1. Locate and open the appointment or service activity you want to print.
2. On the Actions toolbar, click the **Print** button .
3. In the **Preview** dialog box, click **Print**.
4. In the **Print** dialog box, set the printing options you want, and then click **Print**.
5. On the Standard toolbar, click **Close**.

Note

To print the entire calendar as you see it in the window, click **Print** in Microsoft Internet Explorer.

Run a report

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Find and open a report:

From the Reports area

a. In the **Workplace**, under **My Work**, click **Reports**.

b. To narrow the list, enter the first few letters of the report name, or use the asterisk (*) wildcard in the **Search for records** box and then click the **Find** button . You can also select a view.

c. In the reports list, double-click the report that you want to run.

If the report has a default filter, the default filter will be displayed. Follow step 2 to change the filter.
Tip: To run a report without seeing the default filter, select the report, and then on the Actions toolbar, click **More Actions**, and then click **Run Report**.

From a list of records, including the results of an Advanced Find search

Only reports that relate to the current record type will be available.
You can run some reports on all records in the list, up to ten selected records, or without limiting the records as if you were running the report from the Reports area.

- To run a report on all records on the list:

  a. On the Actions toolbar, click **Reports** .

  b. Under **Run on Selected Records**, click the name of the report.

  c. In the **Select Records** dialog box, click **All records on all pages in the current view**, and then click **Run Report**.

- To run a report on up to ten selected records from the list:

  a. Select the records to include. Select several records by pressing the CTRL key while you click each record.

  b. On the Actions toolbar, click **Reports**.

  c. Under **Run on Selected Records**, click the name of the report.

  d. In the **Select Records** dialog box, click **The selected records**, and then click **Run Report**.

- To run a report without limiting records to items on the list:

  a. On the Actions toolbar, click **Reports**.

  b. If the report is listed under **Run on All Records**, select the report.

  – OR –

  Under **Run on Selected Records**, click the name of the report. In the **Select Records** dialog box, click **All applicable records**, and then click **Run Report**.

  – OR –

  If the report you want to run is not listed, you must go to the Reports area to run the report.

From a record

Only reports that relate to the current record type will be available.

To run a report including data from just one record:

a. With a record open, on the Actions toolbar, click **Reports** .

b. Under **Run on Current Record**, click the name of the report.

From Microsoft Dynamics CRM for Outlook

All reports can be run when you are online.

To run a report while you are offline, you must first create a local data group that includes the report, as well as a local data group that includes any data that should be included in the report.

To create a local data group that contains reports, on the **CRM** menu, click **Modify Local Data Groups**, click **New**, select the the **Report** record type, and then define the criteria for which reports to include. More information: Work with Data to Take Offline

- To run reports from the Reports area, in the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, click **Workplace**, click **My Work**, click **Reports**, and then select a report to run.
- To select a report from a record or list, follow the procedures above. These steps work the same way in Microsoft Dynamics CRM for Outlook.

From a report you saved locally

If you have saved a report on your computer or shared file system that reads dynamic data from Microsoft Dynamics CRM, to open it, browse to the folder that contains your saved report, and double-click the file.

If the report offers filter criteria, if needed, modify the filter criteria and then click **Run Report**.

The list of existing report filtering criteria is grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**.

To edit a parameter in simple mode, click the underlined value and enter a new value.

– OR –

To edit the filter criteria in detailed mode:

. Click **Edit Filter**.

a. To add a criteria row:

1. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
2. Click the query relational operator, and select an operator.

3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.

b. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

0. For each row you want to group, in detailed mode, click the **Options menu** button ▼ for that row, and then click **Select Row**.
1. On the Filter toolbar, select **Group AND** or **Group OR**.
2. To remove a row from a group, click the **Options menu** button ▼ for that row, and then click **Delete**.
3. To select a group, click the **Options menu** button ▼ for that group, and then click **Select Group**.
4. To add a criteria clause to a group, click the **Options menu** button ▼ for that group, click **Add Clause**, and then select the field, query relational operator, and value.
5. To unselect a group that has been previously selected, click the **Options menu** button ▼ for that group, and then click **Deselect Group**.
6. To ungroup a group, click the **Options menu** button ▼ for that group, and then click **Ungroup**.
7. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button ▼ for that group, and then click **Change to OR** or **Change to AND**.

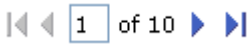
Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button ▼ for that row, and then click **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click the **Options menu** button ▼ for that row, and then click **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click the **Options menu** button ▼ for that row, and then click **Show in Simple Mode**.
- You can set your personal options so that report filters and Advanced Find criteria always open in simple or detailed mode. More information: Set Personal Options

If the report offers parameters, if needed, modify the parameters and then click **View Report**.

Locate data in the report.

- To view or change a record, click the first field in the row for the record. A separate Microsoft Dynamics CRM window will open with the record.
- To view all records associated with a summary or chart report, click **Show All** at the bottom of the report. To navigate back to the original report, click **Original Report** in the report title area.

- To view detailed information about an area in a chart, click an area of the chart. To navigate back to the original report, click **Original Report** in the report title area.
- To page through the report, on the Report toolbar, use the **Page Navigation** buttons  . To locate a specific page, type a page number in the box and then press **Enter**.
- To quickly locate specific information in your report, in **Find | Next**, type a few characters, and then click **Find**.
- To sort a column, click the column title. The direction of sorting is indicated by the **Ascending sort** button or the **Descending sort** button .
- To view or hide the filter summary, expand or collapse **Filter Summary**.
- To update your report, click the **Refresh** button .
- To hide the report parameters, click the **Hide Parameters** button . To display the report parameters, click the **Show Parameters** button .

Print the report. On the Report toolbar, click the **Print** button .
If you are working offline using Microsoft Dynamics CRM for Outlook, on the Report toolbar, select **Web archive** format, click **Export**, and then on the **File** menu, click **Print**.

Tips

- If a chart doesn't display the first time you export a report to **Web archive** format, export the report a second time.
- To print reports, you need a Reporting Services Microsoft ActiveX control. The first time you print a Reporting Services report from either Microsoft Dynamics CRM or Microsoft Dynamics CRM for Microsoft Office Outlook, you will see a prompt **Do you want to install this software?**.

  To install the required control, click **Install**.

Export the report.

Important The exported report is temporary. If you need to save the exported report to a local file, use the viewing program to save the file to disk. The saved exported report is no longer connected to Microsoft Dynamics CRM. Therefore, it does not change if Microsoft Dynamics CRM data changes.

. In the **Export** box, select a format, and then click **Export**.
  A second browser window is used to display the report, using a viewer associated with the export format you selected.
  The formats that are available are determined by the rendering extensions that are installed on the Microsoft SQL Server Reporting Services report server, and also by whether you are online or offline.

  - If you are working offline, only the **Excel** and **Acrobat (PDF) file** formats are available.
  - If you are using Microsoft SQL 2005 Workgroup edition, the **XML file with report data** format is not available.

  If a viewer is not available for the format you select, you must select a different format or install the viewer.

The following export formats are included in a default installation when you are online. The list of export formats available to you may vary from those listed here.

- **Excel**
  View the report in Microsoft Office Excel. This format includes all the row, column, and field labels, in addition to report formatting.
  Large reports and reports with charts might not display with the expected formatting when exported in this file format. To export only the data, instead of using this format, from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, export the data into Microsoft Office Excel, and then save as a comma-delimited (CSV) file. More information: Export Data to Excel
- **Web archive**
  View the report in Microsoft Internet Explorer, as a MIME-encoded HTML format that keeps images and linked content together with a report. For chart reports, if the chart is not displayed correctly the first time that you export the report, export the report again.
  Choose this format to view a report offline or for e-mailing the report.
- **Acrobat (PDF) file**
  View the report using a client-side PDF viewer. You must have Adobe Acrobat Reader to use this format.
  Choose this format for long reports, paginated reports, or reports that are delivered as a file.
- **TIFF file**
  View the report in the default TIFF viewer. For some Windows clients, this is the Windows Pictures and Fax Viewer.
  Choose this format to a view a report in a page-oriented layout. The TIFF format is the recommended format for printing reports.
- **CSV (comma delimited)**
  View the report as a text file, with fields separated by commas. This format includes all the row, column, and field labels.
  To export only the data, instead of using this format, export data from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, into Microsoft Office Excel, and then save as a comma-delimited (CSV) file.
- **XML file with report data**
  View the report as an XML file.

Tips

- If there is no report that gives you the information you need, you can either export data to Microsoft Office Excel, or create your own report. More information: Export Data to Excel, Create and Work with Reports
- If a snapshot of a Reporting Services report exists, you can view it from the Reports area. To see if any snapshots exist for a report, click the **View Snapshots** button next to the report. If a snapshot exists, click the snapshot link to view the snapshot.

Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: Set Personal Options

Manage Activities

Create or edit an activity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. To add new activities from the **Activities** list, on the Actions toolbar, click **New**.

   – OR –

   To add a new activity from a record, click **New Activity**. You can also click the activity icons on the Actions toolbar, or on the **New** menu, point to **New Activity**, and then select the activity type.

Tip

To quickly create a follow-up activity from a record, in the Actions toolbar, click **Follow Up** , fill in the details in the Form Assistant pane, and then click **Save**.

3. Select an activity type, and then click **OK**.
4. Enter the information that you want. At a minimum, entering information in the following boxes is useful when you or others in your organization refer to the activity at a later date:

   - **Subject**
     Enter a meaningful description that can help you easily identify the activity in the Activities list view. The subject field is required because, by default, most of the Activities views are sorted by it. This field is not related to Subjects, which are the hierarchical list of categories used to relate and organize information in Microsoft Dynamics CRM.
   - **Regarding**
     This field is used to link the activity to another record so that you can view the activity from the record. If you create a new activity from a record, this is automatically filled out.
   - **Owner**
     This box represents the user who owns the activity. By default, it is set to the user who creates the activity.
   - **Duration**
     If this activity is related to a case, make sure that you record the time you spend on the activity in this box. If the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer. The maximum duration of an appointment or service activity is 10 days.

- **Due**
  Enter the date and time that the activity is expected to take place or be completed. You can quickly sort on the **Due** field when you view activities.

Tip

To automatically update the Regarding field with information from a record, click the **Expand** button in the right pane to open the Form Assistant pane, and then select a record.

5. Some activities also have the following optional fields:

   - **Sender**
     You can use this field to record the user in your organization who initiated an outgoing communication. Alternatively, if this is an incoming communication from a customer, you can select the lead, account, or contact who initiates the communication. The sender must be a valid Microsoft Dynamics CRM account, contact, or lead, but can also be a Microsoft Dynamics CRM user. By default, this box contains the name of the user who creates the activity.
   - **Recipient**
     This is the person, typically an account, contact, lead, or Microsoft Dynamics CRM user, that receives the communication.
   - **Category**, **Sub-Category**
     You can use these text fields to categorize tasks so that you can sort or view your tasks by category and/or sub-category.

6. Click **Save** or **Save and Close**.

Tip

If you are using the activity to track something that has already been completed, on the **File** menu, click **Save as Completed**.

Notes

- To create the same activity for multiple records, use a quick campaign. More information: Work with Quick Campaigns
- You cannot edit multiple activities at once.
- You cannot schedule recurring activities.
- You cannot edit closed activities.
- You cannot change one activity into another type of activity.
- You cannot set reminders in Microsoft Dynamics CRM for Microsoft Office Outlook for faxes, phone calls, e-mails, letters, or campaign responses activities created in the Web application or Microsoft Dynamics CRM for Outlook.
- When the duration of an activity is more than 60 minutes (an hour), the time you enter is converted into hours. When the activity is saved, the value is rounded up and might change from the entry that was originally displayed when it was converted from minutes into hours. Note that rounding is only observed on the hundredth of an hour. The exact value for the duration, however, is stored in

the database in minutes, and this value is used to calculate the total billing time when resolving cases.

- The letter and fax activities record when the letter or fax is sent or received. When you create the activity, you attach the letter or fax document, such as a Microsoft Office Word file, to the record. With the mail merge feature, you can write your letter and include Microsoft Dynamics CRM data. More information: Create Customer-Ready Documents and Messages

Create and send an e-mail activity in the Web application

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create and send e-mail activities from Microsoft Dynamics CRM from the Activities area. E-mail messages sent from Microsoft Dynamics CRM do not appear in the Microsoft Dynamics CRM mail folders in Outlook.

1. Start Microsoft Dynamics CRM 4.0.
2. In the Navigation Pane, click **Workplace**, and then click **Activities**.
3. On the Actions toolbar, click **New**.
4. In the **New Activity** dialog box, click **E-mail**, and then click **OK**.
5. On the **E-mail** tab, you must enter the following information.
   - **From**
     Locate and select the sender's name.
   - **To**
     Locate and select one or more recipients. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Subject**
     Type a subject for your e-mail message.
   - **Duration**
     This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.
   - **Due**
     If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.
   - Enter any additional information you want. Use the Formatting toolbar
     You cannot enter HTML tags or insert images into the body text of the message.

▸ Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image

is displayed as long as the receipient has access to the Web site.

6. You can also attach an article, template, or file to an e-mail activity.

To attach an article

a. To look up and select an article, on the Formatting toolbar, click **Insert KB Article**.

b. Use the **Search** tab to specify conditions or criteria to locate the article.

c. In the results list, select the article, and then click **OK**.
The article appears the body of in your e-mail message.

d. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.

b. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

c. Click **OK**.
The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

d. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

b. On the **Attachments** tab, click **New E-mail Attachment**.

c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

d. Click **Attach**.

To send the message immediately, click **Send**.
The message is sent and the new closed activity appears in the History area with an assigned message number appended to the **Subject** column and the date sent in the **Actual End** column.

– OR –

To send the message at a later time, click **Save and Close**. The new draft activity appears in the Activities area. You can delete draft messages.

To send the message, in the list of activities, open the e-mail activity, and click **Send**.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- You can view the sent date of an e-mail message on the **Activities** list. The **Actual End Date** is the date the message was sent and closed.
- You can forward or reply to an e-mail activity, but you cannot resend it.
  To reply to only the original sender, on the Actions toolbar, click **Reply**.
  To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.
  To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.
- There is no spelling checker built into Microsoft Dynamics CRM. There may be third-party solutions available. For more information, visit Microsoft Dynamics CRM Solution Finder.

Close an activity

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

▸ Activity types that can be closed

- Tasks
- Faxes
- Phone Calls
- Letters
- Appointments
- Service Activities
- Campaign Activities

Unless you have created an activity record by mistake, it is better to close or convert an activity than to delete it. You can view closed or converted activities at a later date for reference, or run reports to determine the success rate of your activities.

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.
3. On the **Actions** menu, click **Close** *activity type*. For example, if you are in a task record, click **Close Task**.
4. In the confirmation dialog box, select the status that you want from the **Status** list, such as **Completed** or **Canceled**, and then click **OK**.

Notes

- When you close an activity, the activity becomes read-only and cannot be edited or reopened.
- To view closed activities, do one of the following:
  - In the Activities list, select the **Closed Activities** view.
  - Use Advanced Find, and specify **Activity Status** in the search criteria.
  - From an Account, Contact, Lead, or Opportunity record, under **Details**, click **History**. In the **Filter on** and **Include** lists, select the view options that you want.
- It is not possible to close multiple activities at once.
- The only way to close an e-mail activity is to send it. If you do not use Microsoft Dynamics CRM to send or receive e-mail, click **Send**. This will close the activity, but no e-mail message will be sent.

Convert an activity to an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Activity types that can be converted

- Faxes
- Phone Calls
- E-mail Messages
- Letters
- Appointments

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.
3. On the Actions toolbar, click **Convert Activity**, and then click **To Opportunity**.
4. In the **Convert Activity to Opportunity** dialog box, enter information in the following boxes:
   - **Customer**

     You must click the **Lookup** button to select or create a new customer.
   - **Source Campaign**

     Click **Lookup** if you want to associate a source campaign with this activity.

- **More Actions**
  By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion.
  - Close the activity as completed.
  - Open the new opportunity after the conversion.
  - Create a campaign response based on the information included in the opportunity.
    Important If you are converting an activity to an opportunity that is not associated with a Source Campaign, you must clear the **Record a closed campaign response** check box.

  To change the conversion operations, clear the associated check boxes.

5. In the **Convert Activity to Opportunity** dialog box, click **OK**.
6. Click **Save** or **Save and Close**.

Note

The originating activity becomes a related activity for the new opportunity. If the activity is open, it appears in the **Activities** list for the opportunity. If the activity is closed, it appears in the **History** list.

Convert an activity to a case

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.

▸ Activity types that can be converted

- Faxes
- Phone Calls
- E-mail Messages
- Letters
- Appointments

3. On the Actions toolbar, point to **Convert Activity** and then to **Case**.
4. In the **Convert Activity to Case** dialog box, enter information in the following boxes:

- **Customer**

  You must click the **Lookup** button to select or create a new customer.

- By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:
  - Close the activity as completed.
  - Open the new case after the conversion.

To change the conversion operations, clear the associated check boxes.

5. In the **Convert Activity to Case** dialog box, click **OK**.

Note

The originating activity becomes a related activity for the new case. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **History** list.

Convert an e-mail to a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the e-mail activity that you want to convert.
3. On the Actions toolbar, point to **Convert Activity** and then to **To Lead**.
4. In the **Convert E-mail to Lead** dialog box, enter information in the following boxes:
   - **First Name**
   - **Last Name**
   - **Company**
   - **E-mail Address**
   - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:
     - Open the new lead after the conversion, if all the required information for the lead is available. Otherwise this option is not available.
     - Close the e-mail form.

   To change the conversion operations, clear the associated check boxes.

5. Click **OK**.

Notes

- The originating activity becomes a related activity for the new lead. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **History** list.
- The icon in the Activities list changes.

Assign an activity to a user or queue

Can I do this task?

If the **Assign** button is not visible on the toolbar, the security role assigned to your account does not have permission to assign this type of record. To check your permissions for a specific record, open the record, click the **File menu** button, and then click **Properties**.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. In the list of records, select the record that you want.

Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.
- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click the **Assign** button.

In the **Assign to Queue or User** dialog box, type all or part of the queue or user name, and then click the **Lookup** button .

In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.

In the **Search for records** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .

In the list of records, click a record to select it, click the **Add Selected Records** button to add the record to the **Selected records** list, and then click **OK**.

On the **User or Queues** form, click **OK**.

Add a Note or Attach a File

Add, edit, or delete a note

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

▸ Record types that you can add notes to

- Accounts
- Appointments
- Campaigns
- Campaign Responses
- Cases
- Competitors
- Contacts
- Contracts
- Faxes
- Leads
- Letters
- Marketing Lists
- Opportunities
- Phone Calls
- Products
- Service Activities
- Tasks

1. Open the record that you want.

2. For most record types, click the **Notes** tab.
    - On the E-mail form, click the **Attachments** tab.
    - On the Service Activity form, click the **Service Activity** tab.
    - On the Case form, click the **Notes and Article** tab.
3. To add a note, click **Click here to enter a new note**.

    – OR –

    To open and edit a note, double-click the status row above the note, or right-click the note and then click **Open**.

4. In the **Note** form, you can make changes to the following boxes:
    - **Title**
      Change the title of the note. Titles must have a length of 64 characters or less. Titles are not displayed in the notes list.
    - **Note content**
      Add, remove, or edit the note content.
    - **Regarding**
      You can use this item to open and make changes to the activity or record that this note is associated with.
    - **File Attachment** section
      Add or remove a file attachment. In the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach, and then click **Attach**.

Tips

- Each note can have only one attached file, so if you need to attach multiple files, create a note for each file.
- The maximum size of the file that you can attach to a record is defined by your system administrator. More information: System Settings Dialog Box - E-mail Tab

5. Click **Save** or **Save and Close**.

Tips

- To paste text from the Clipboard into a note, open the note, and then press CTRL+V.
- To use a tab in a note, copy the text from a file that includes the tab, and then use CTRL+V to paste the text into the note.

Note

To delete a note, double-click the status row of the note to open it, and then on the **Actions** menu, click **Delete Note**. If you do not have appropriate permissions to delete any of the records associated with the note, you will not be able to delete it.

Attach a file

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the record that you want.
2. On the Actions toolbar, click the **Attach a File** button .
3. In the **Add Attachment** dialog box, type the path and name of the file to attach or click **Browse** to locate the file.
4. Click **Attach**, and then click **Close**.
   The attachment is added as a note.
5. Click **Save** or **Save and Close**.

Notes

- To add multiple files, for each file, repeat steps 2 through 4. Each attachment is added as a new note.
- You cannot update an attached file. Instead, save the file on your computer and edit the file, delete the attachment, and then attach the edited file.
- To add an attachment to an e-mail activity, first save the activity, and then on the **Attachments** tab, click **New E-mail Attachment**. After selecting or browsing for a file, click **Attach**.
- The maximum size of the file that you can attach to a record is defined by your system administrator. More information: System Settings Dialog Box - E-mail Tab
- The types of files that can be attached are defined by your system administrator. More information: Manage System Settings

Remove an attached file

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the record that you want.
2. For most record types, click the **Notes** tab.
   - On the E-mail form, click the **Attachments** tab.
   - On the Service Activity form, click the **Service Activity** tab.
   - On the Case form, click the **Notes and Article** tab.
3. Double-click the status row of the note that contains the attachment you want to remove.
4. To keep the note, but remove the attachment, in the **Note** form, in the **File Attachment** area, click **Remove**, click **OK**, and then click **OK** again.

– OR –

To remove the note and the attachment, on the **Actions** menu, click **Delete Note**, and then click **OK**.

5. Click **Save** or **Save and Close**.

Note

You cannot update an attached file. Instead, save the file on your computer and edit the file, delete the attachment, and then attach the edited file.

Edit Multiple Records

Caution When you edit or delete multiple records, you cannot undo the changes.

Edit multiple records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Record types that can be bulk edited

- Accounts
- Cases
- Contacts
- Leads
- Marketing Lists
- Opportunities

1. In any list, select multiple records:
   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

Tip

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.

5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click **More Actions**, and then click **Edit**.

In the **Edit Multiple Records** form, make the changes that you want.

Any fields that you enter data in will change in all selected records. Other fields will be left unchanged.

Click **Save**.

Notes

- You cannot perform a multiple edit operation on activities, lookup fields, or notes.
- You cannot use this form to clear data in a field.
- You cannot use this form to change the status of records. However, to change the status for a group of leads, add them to a marketing list. More information: Work with Marketing Lists

Delete records

Can I do this task?

If the **Delete** button is not visible on the toolbar, the security role assigned to your account does not have permission to delete this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

If you are deleting a record that has child records, you can delete it only if you also have permission to delete any child records.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. In any list of records, select the record that you want to delete.

   – OR –

   In any list, select multiple records:

   - Select several records by pressing the CTRL key while you click each record.
   - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
   - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

Tip

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click the **Delete** button .

If you are deleting accounts or contacts, you have the option to deactivate the record instead of deleting it. In the **Delete Confirmation** dialog box, to delete the record, click **Delete**, or to deactivate it, click **Deactivate**.
For other record types, in the **Confirm Deletion** dialog box, click **OK**.

Notes

- When you delete a record, all its relationships to other records are also deleted.
- If the record has child records, and you have permission to delete the child records, the child records will also be deleted.

Check for Duplicates

Search for potential duplicate records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type.

1. Start duplicate detection:

Start duplicate detection from any list of records, including results of an Advanced Find search

a. In any list, on the **More Actions** menu, click **Detect Duplicates**.
b. To search selected records, click **For Selected Records**.

– OR –

To search all records on all pages of the current view, click **For All Records on All Pages**.

Start duplicate detection from the Workplace, Tools menu, or Settings area

a. On the **Tools** menu, click **Duplicate Detection**.

   – OR –

   In the **Workplace**, in the **My Work** section, click **Duplicate Detection**, and then click **New**.

   – OR –

   In the Navigation Pane, click **Settings**, click **Data Management**, click **Duplicate Detection Jobs**, and then click **New**.

b. Click **Next**.

c. To specify the record type to check for duplicates, in the **Look for** box, select a record type. Only record types that have published duplicate-detection rules will be included in the **Look for** box. More information: Work with Duplicate-detection Rules

d. Select criteria to define the records to check for duplicates:

   - To use criteria from a saved view, in the **Use Saved View** box, select a view from the System Views or My Views section.

     – OR –

     For each criteria to add, click **Select**. More information: Work with Advanced Find

e. Tips:

   - To preview the records to make sure you have the records you want, click **Preview Records**.
   - To change which columns are displayed in the preview, or the column order, sort order, or column widths, click **Edit Columns**.
   - To save these criteria to use later, click **Save As**. This saves the criteria as a saved view. This saved view will be available in the **My Views** section of the **View** box.

f. Click **Next**.

3. Specify:

   - The name of the duplicate-detection job.
   - When you want the duplicate-detection job to start. You also can specify to run the job on a regular schedule.
   - Whether you want notification sent to you and to other users when the background duplicate-detection job completes.

   Click **OK**, or click **Finish**.

Duplicate-detection is processed in the background. If you requested notification, you will receive an e-mail notification when the job completes, with a link to the page where you can resolve duplicates.

To view the potential duplicates, after the duplicate-detection job completes, in the **Workplace**, under **My Work**, click **Duplicate Detection**.

Open your duplicate-detection job.

Under **Details**, click **View Duplicates**.

The top list displays all records that have potential duplicates. When you select a record in the top list, the bottom list shows all the potential duplicate records.

In the top list of records that may have duplicates, select a record.

In the list of potential duplicate records, for each potential duplicate record found, select the record, and then do any of the following actions:

- **View the record.** To view the contents of a record to help you decide what to do, double-click the record.
- **Edit the record.** On the Actions toolbar, click **More Actions**, and then click **Edit**.
- **Deactivate the record.** On the Actions toolbar, click **More Actions**, click **Deactivate**, and then in the confirmation dialog box, click **OK**.
- **Merge the records.** On the Actions toolbar click the **Merge** button .

  If you want the record in the top list to be the master record, click **Automatically**.

  – OR –

  If you want to choose the master record:

  1. Click **Select Master**.
  2. In the **Merge Records** dialog box, select which record to make the new master record.
  3. Select the fields from each record that you want to include in the master record. Fields that are shaded will overwrite the corresponding unshaded field during the merge operation.
  4. When you are ready to merge the two records, click **OK**.

  When you receive the message **The selected records are merged and the subordinate record is deactivated**, click **OK**.

- **Delete the record.** On the Actions toolbar, click the **Delete** button . In the **Select Delete or Deactivate** dialog box, click **Delete**, and then in the confirmation dialog box, click **OK**.

  When you have finished resolving duplicates, click **Close**.

Notes

- Your system administrator or system customizer determines the criteria for identifying a record as a potential duplicate. More information: Requesting User Interface Changes
- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.
- To refresh the list of duplicate records, you must run a new duplicate-detection job:
  - After a record has been merged or deactivated, the record is still displayed on the bottom list.

- You can use the **Modified On** column to determine whether a record was modified after the duplicate-detection job was run.
- After a record has been deleted, merged or deactivated, the record is still displayed on the top list.

Merge records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can merge two lead, account, or contact records.

1. Click to select a record, and then press the CTRL key while you click the second record.
2. On the Actions toolbar click the **Merge** button .
3. If you want the record in the top list to be the master record, click **Automatically**.

   – OR –

   If you want to choose the master record:

   a. Click **Select Master**.
   b. In the **Merge Records** dialog box, select which record to make the new master record.
   c. Select the fields from each record that you want to include in the master record. Fields that are shaded will overwrite the corresponding unshaded field during the merge operation.
   d. When you are ready to merge the two records, click **OK**.
4. When you receive the message **The selected records are merged and the subordinate record is deactivated**, click **OK**.

Check Your Permissions for a Record

View your permissions for a record

1. In the list of records, open the record that you want.
2. Click the **File menu** button , and then click **Properties**.

Tip

If you do not have permissions that you need to do your job, contact your manager. More information: Requesting User Interface Changes

View your user profile

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Your user profile displays information about you, including general information such as your contact information and addresses, what teams and resource groups you belong to, which services you can perform, and your work hours and security roles. This information is visible to the entire organization. Depending on your security role, you may be able to make changes to your user profile.

If you are working in Microsoft Dynamics CRM for Outlook, you can view this information from the User form. More information: Work with Your User Record and Work Hours

1. Under **Workplace**, click the **Personalize Workplace** link.
2. In the **Set Personal Options** dialog box, click the **General** tab.
3. At the bottom of the page, click the **View your user profile here** link.
   The User form with your information opens.
4. To view details or make changes, under **Details** or **Service** click any of the following:
   - Teams
   - Roles
   - Quotas
   - Work Hours
   - Services
   - Resource groups
   - Workflows
5. To close the form, on the **File** menu, click **Close**.
6. To close the **Set Personal Options** dialog box, click **OK**.

Start an On-Demand Workflow

If you or your organization have created on-demand workflows, you can apply these workflows to records that appear in a list.

Start an on-demand workflow

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the list of records that contains the record you want to apply a workflow to, such as leads or cases.

2. Select the record or records that you want to apply a workflow to.
3. On the Actions toolbar, click **Run Workflow**.
4. In the **Look Up Records** dialog box, select the workflow that you want to run, and then click **OK**.
5. In the confirmation message, click **OK**.

Note

The **Run Workflow** button does not appear on the Actions toolbar if no on-demand workflows have been created for the record type that you are viewing.

Sharing Records with Coworkers

Share or Assign Records

When you share a record with another user, you are giving that user specific permissions, such as Read, Write, or Delete, to that record. When you assign a record to another user, you are making that user the owner of the record.

Share a record

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

▸ Record types that can be shared

- Accounts
- Cases
- Campaigns
- Contacts
- Contracts
- Invoices
- Leads
- Marketing Lists
- Opportunities
- Orders
- Quotes
- Reports

1. In the list of records, select the record that you want.

▸ Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.

- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click **More Actions**, and then click **Sharing**.

In the sharing dialog box, under **Common Tasks**, click **Add User/Team**.

In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.

In the **Search for records** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .

In the list of available records, click a user or team to select it, and then click the **Add Selected Records** button to add the user or team to the **Selected records** list.

Repeat step 6 to add more users or teams.

Click **OK**.

In the sharing dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.

Click **OK**.

Tips

- To see records that have been shared with you, use Advanced Find to create a saved view that includes the owner column. If you can access the record, but are not the owner, it has been shared with you.
- If you want to limit the permissions on a record you own, you can share the record with yourself. Then, you can limit the permissions on the record. For example, if you clear the delete permission on a record, you will not be able to delete that record.

Notes

- To cancel any changes that you have made and retain the previous permissions settings, click **Reset**.
- To select or clear all permissions on a selected item, click **Toggle All Permissions of the Selected Items**.

- You cannot create a new contact or account that is shared by default.
- When you share a record, the user with whom you share the record inherits the privileges on certain associated records. For example, when you share a contact, the user is also granted the same privileges on the parent account. To prevent privileges from cascading, a user with the appropriate security role can change this behavior by customizing the relationship definition for the record type. More information: Work with Entities

Unshare or change sharing for a record

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the list of records, select the record that you want.

Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.
- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click **More Actions**, and then click **Sharing**.

To remove a user or team, in the row for the user or team whose rights you want to change, select the check box, and then under **Common Tasks** click **Remove Selected Items**.

– OR –

To edit permissions on a record for a user or team, select or clear one or more permissions check boxes, such as **Read** or **Delete**.

Click **OK**.

Notes

- To cancel any changes that you have made and retain the previous permission settings, click **Reset**.
- To select or clear all permissions on a selected item, click **Toggle All Permissions of the Selected Items**.

Assign a record to a user

Can I do this task?

If the **Assign** button is not visible on the toolbar, the security role assigned to your account does not have permission to assign this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the list of records, select the record that you want.

Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.
- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click the **Assign** button .

In the **Assign** dialog box, click:

- **Assign to me**
  Use this option to assign the record to yourself.

  – OR –

- **Assign to another user**

  Click the **Lookup** button , type a part of the user's name, click the **Find** button , double-click the user's name, and then to close **Look Up Records** dialog box, click **OK**.

  Click **OK**.

Tips

- You can create your own Advanced Find view that includes records belonging to users to whom you normally assign records.
- If you have a security role with appropriate permissions, you can reassign all records belonging to one user to another user.
  1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.
  2. Open the record for the user whose records you want to reassign.
  3. On the **Actions** menu, click **Reassign Records**, and then click **Assign to another user**.
  4. Click the **Lookup** button , type a part of the user's name, click the **Find** button , double-click the user's name, and then to close **Look Up Records** dialog box, click **OK**.

Notes

- You cannot assign records to teams. To give a team access to a record, share the record with the team.
- Your system administrator may have enabled reassigned records to be automatically shared with the original owner. More information: Manage System Settings

Assign an activity to a user or queue

Can I do this task?

If the **Assign** button is not visible on the toolbar, the security role assigned to your account does not have permission to assign this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. In the list of records, select the record that you want.

Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.
- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click the **Assign** button .

In the **Assign to Queue or User** dialog box, type all or part of the queue or user name, and then click the **Lookup** button .

In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.

In the **Search for records** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .

In the list of records, click a record to select it, click the **Add Selected Records** button to add the record to the **Selected records** list, and then click **OK**.

On the **User or Queues** form, click **OK**.

Assign a case to a user or queue

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

After a case is created, it can be assigned to another user or to a queue. After accepting a case, the assigned user can continue working with the customer.

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. In the list of cases, select the case you want to assign.

Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.
- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click the **Assign** button .

In the **Assign to Queue or User** dialog box, to assign the case to another user or queue, select **Assign to another user or queue**.

Then to select a record, click the **Lookup** button .

Click **OK**.

Note

After a case is assigned to a queue, it is displayed in the **Queues** area. If it was assigned to a user, it will appear in his or her **Assigned** area. An assigned case belongs to the user who created it until it is accepted by another user.

Make a report available to all Microsoft Dynamics CRM users

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report you created, and on the Actions toolbar, click **Edit Report**.
3. On the **Actions** menu, click **Make Report Available to Organization**.

Note

To revert a report back to a personal report, on the **Actions** menu, click **Revert to Personal Report**.

Send or Copy a Shortcut

Only another Microsoft Dynamics CRM user who has permission to see the view or the record will be able to open the record.

Send or copy a shortcut to a record

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can send a shortcut to a specific record or group of selected records in Microsoft Dynamics CRM in an e-mail message to any user.

This feature does not use Microsoft Dynamics CRM e-mail; it uses your default Microsoft Internet Explorer e-mail. If the person receiving the e-mail does not have permissions to the view, they will receive an error. Not all views are available. No activity is created for this action.

You can also copy the shortcut and paste it into any document.

1. In the list of records, select the record that you want.

Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.
- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

Do one of the following:

Send a shortcut in an e-mail

. On the Actions toolbar, click **Send Shortcut**, and then click **Of Selected Item**.

a. Complete the e-mail form and send.

Tip: If you are working in Microsoft Dynamics CRM for Outlook and you want to track this e-mail, you can

use **Track in CRM**.

Copy a shortcut

. On the Actions toolbar, click **Copy Shortcut**, and then click **Of Selected Item**.

a. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V.

Important

The shortcut is not a snapshot of the data, but a link to the live data.

Send or copy a shortcut to a view

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can send a shortcut to a specific saved view in Microsoft Dynamics CRM in an e-mail message to any user.

This feature does not use Microsoft Dynamics CRM e-mail; it uses your default Microsoft Internet Explorer e-mail. If the person receiving the e-mail does not have permissions to the view, they will receive an error. Not all views are available. No activity is created for this action.

You can also copy the shortcut and paste it into any document.

Pages that you cannot e-mail or copy

- Contract Template list
- Article list

- In any available, saved view, do one of the following:

Send a shortcut in an e-mail

a. On the Actions toolbar, click **Send Shortcut**, and then click **Of Current View**.

b. Complete the e-mail form and send.

Tip: If you are working in Microsoft Dynamics CRM for Outlook and you want to track this e-mail, you can use **Track in CRM**.

Copy a shortcut

a. On the Actions toolbar, click **Copy Shortcut**, and then click **Of Current View**.

b. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V.

Important

The shortcut is not a snapshot of the data, but a link to the live data.

Export Data to Excel

You can export any list to Microsoft Office Excel, including the results of an Advanced Find search.

You can export to a static or dynamic Excel worksheet or to a PivotTable.

Export data to an Excel static worksheet

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In any area with a list of records, select the columns to include in the exported list.
   By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.

   To make changes to the columns in an Advanced Find View, click **Edit Columns**. You can make the following types of changes:

▸ Change the column order

To change the column order, select a column heading, such as **Account Name**, and then under **Common Tasks**, click the **Move Left** button or the **Move Right** button to move the column.

▸ Add columns

a. To add columns to the export list, click **Add Columns**.

b. To add columns for the main record type, select it, and then in the **Add Columns** list, click to select fields that you want to add as columns.

c. To add columns from related records, first select the related record type, and then in the **Add Columns** list, click to select fields that you want to add as columns.

d. Click **OK**.

▸ Configure sorting

To change the sort order, click **Configure Sorting**, in the **Column** list, select the column that you want to sort, in the **Order** area, click **Ascending Order** or click **Descending Order**, and then click **OK**.
You cannot sort on columns from related record types.

▸ Change column width

To change the column width that will appear in the Excel worksheet, select a column heading, such as **Account Name**, click **Change Properties**. In the **Change Column Properties** dialog box, select the

width (in pixels) that you want, and then click **OK**.

▸ Remove columns

To remove a column, select the column heading that you want to remove, and under **Common Tasks**, click **Remove**, and then in the confirmation message, click **OK**.

You cannot change the columns for a system view, such as **All Active Accounts**. You must either customize the view, which requires the System Administrator or System Customizer security role, or use Advanced Find to create your own view based on the current view. To create your own view, with the system view open, click **Advanced Find**.

2. On the Actions toolbar, click the **Export to Excel** button .
3. In the **Export Data to Excel** dialog box, select **Static worksheet with records from this page**.

   – OR –

   Select **Static worksheet with records from all pages in the current view**.
   This option will be visible only when your view includes more than one page of records.
4. Click **Export**.
5. To view the static worksheet, click **Open**.
   If you are using Microsoft Office Excel 2007, you will see a message that says the file you are trying open is in a different format than specified by the file extension. Click **Yes**.
6. To save the exported data to a file, in Excel, on the **File** menu, click **Save**.

▸ Tip

You can e-mail a static exported worksheet to anyone, or store it in a shared file. Anyone who opens the file will see all the data in the file, whether or not they are a Microsoft Dynamics CRM user or have privileges to view the data in Microsoft Dynamics CRM.

Notes

- There is potential for data loss if you export from Microsoft Dynamics CRM to a Microsoft Office Excel 2003 comma-separated value (CSV) file.

  To ensure that the file is exported correctly, you must have data in every row of the last column of the list you are exporting. You can add a space or other character in last column of the file or reorder the columns so that the last column always contains data. More information: Microsoft Knowledge Base Article 77295

- By default, in Microsoft Dynamics CRM, you cannot export a list of more than 10,000 records at a time to a static Excel worksheet. Your system administrator can change this. More information: Microsoft Knowledge Base Article 911395
- By default, Microsoft Dynamics CRM lists up to 50 records per page. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.

Export data to an Excel PivotTable

1. In any area with a list of records, on the Actions toolbar, click the **Export to Excel** button .
2. Click **Dynamic PivotTable**.
3. To add or remove a column in the report, click **Select Columns**.
4. In the **Select PivotTable Columns** list, select or clear the check boxes for the fields as needed, and then click **OK**.

   By default, only fields that are displayed in the **Select PivotTable Columns** list are included in the PivotTable Field List.

5. Click **Export**.
6. Open the file containing the PivotTable:
   a. To view the PivotTable, click **Open**.
   b. If you are using Microsoft Office Excel 2003, click **Enable automatic refresh**.

      – OR –

      If you are using Microsoft Office Excel 2007:

      - You will see a message that says the file you are trying open is in a different format than specified by the file extension. Click **Yes**.
      - If you see the security warning **Data connections have been disabled**, click **Options**, and then click **Enable this content**, and then click **OK**.
7. Drag the fields from the **PivotTable Field List** to the PivotTable. For more information, see Microsoft Office Excel Help.
8. To refresh data in the file:
   - In Microsoft Office Excel 2007, click the **Data** tab, and in the **Connections** area, click **Refresh All**.
   - In Microsoft Office Excel 2003, on the **Data** menu, click **Refresh Data**.

   To save the exported data to a file, in Excel, on the **File** menu, click **Save**.
   Each time you open the file, you have the option to refresh data from the Microsoft Dynamics CRM database.

Tips

- If you export a dynamic worksheet or PivotTable that you think will be useful to other Microsoft Dynamics CRM users, you can add the list as a report, and then share it with others, or make it available to all Microsoft Dynamics CRM users.
- If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can e-mail a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.

Notes

- There is potential for data loss if you export from Microsoft Dynamics CRM to a Microsoft Office Excel 2003 comma-separated value (CSV) file.

  To ensure that the file is exported correctly, you must have data in every row of the last column of the list you are exporting. You can add a space or other character in last column of the file or reorder the columns so that the last column always contains data. More information: Microsoft Knowledge Base Article 77295

- You must use Microsoft Office Excel XP, Excel 2003, or Excel 2007 to export a list to a PivotTable.
- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

Export data to an Excel dynamic worksheet

1. In any area with a list of records, on the Actions toolbar, click the **Export to Excel** button .
2. Click **Dynamic worksheet**.
3. By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.

   To make changes to the columns, click **Edit Columns**. You can make the following types of changes:

▸ Change the column order

To change the column order, select a column heading, such as **Account Name**, and then under **Common Tasks**, click the **Move Left** button or the **Move Right** button to move the column.

▸ Add columns

a. To add columns to the export list, click **Add Columns**.

b. To add columns for the main record type, select it, and then in the **Add Columns** list, click to select fields that you want to add as columns.

c. To add columns from related records, first select the related record type, and then in the **Add Columns** list, click to select fields that you want to add as columns.

d. Click **OK**.

▸ Configure sorting

To change the sort order, click **Configure Sorting**, in the **Column** list, select the column that you want to sort, in the **Order** area, click **Ascending Order** or click **Descending Order**, and then click **OK**.
You cannot sort on columns from related record types.

▸ Change column width

To change the column width that will appear in the Excel worksheet, select a column heading, such as **Account Name**, click **Change Properties**. In the **Change Column Properties** dialog box, select the width (in pixels) that you want, and then click **OK**.

Remove columns

To remove a column, select the column heading that you want to remove, and under **Common Tasks**, click **Remove**, and then in the confirmation message, click **OK**.

4. Click **OK**, and then click **Export**.
5. View the file containing the dynamic worksheet:
    a. To view the worksheet, click **Open**.
    b. If you are using Microsoft Office Excel 2003, click **Enable automatic refresh**.

    – OR –

    If you are using Microsoft Office Excel 2007:

    - You will see a message that says the file you are trying open is in a different format than specified by the file extension. Click **Yes**.
    - If you see the security warning **Data connections have been disabled**, click **Options**, and then click **Enable this content**, and then click **OK**.
6. To refresh data in the file:
    - In Microsoft Office Excel 2007, click the **Data** tab, and in the **Connections** area, click **Refresh All**.
    - In Microsoft Office Excel 2003, on the **Data** menu, click **Refresh Data**.

    To save the exported data to a file, in Excel, on the **File** menu, click **Save**.
    Each time you open the file, you have the option to refresh data from the Microsoft Dynamics CRM database.

Tips

- If you export a dynamic worksheet or PivotTable that you think will be useful to other Microsoft Dynamics CRM users, you can add the list as a report, and then share it with others, or make it available to all Microsoft Dynamics CRM users.
- If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can e-mail a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.

Notes

- There is **potential** for data loss if you export from Microsoft Dynamics CRM to a Microsoft Office Excel 2003 comma-separated value (CSV) file.

To ensure that the file is exported correctly, you must have data in every row of the last column of the list you are exporting. You can add a space or other character in last column of the file or reorder the columns so that the last column always contains data. More information: Microsoft Knowledge Base Article 77295

- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

Importing Data

Importing Data

Microsoft Dynamics CRM provides several tools to add bulk data into Microsoft Dynamics CRM:

- Import Data Wizard
- Data Migration Manager

If you want to automate the import or migration process, you can use the information in the Microsoft Dynamics CRM Software Development Kit to write a custom import tool.

Comparison: Import Data Wizard and Data Migration Manager

The following table summarizes which tool to use for each task:

Task	Import Data Wizard	Data Migration Manager
Bring data into more than 50 Microsoft Dynamics CRM record types	Yes (All users with appropriate permissions can import data.)	Yes (Only the system administrator can migrate data.)
Bring data into custom record types and attributes	Yes	Yes
Use multiple source files that contain related data	No (You can import only one file at a time.)	Yes
Assign records to multiple users	No (The wizard assigns all records to one user.)	Yes
Detect duplicates	Yes	No (You can run duplicate detection after migrating the records.)
Delete all records associated with one job	No	Yes
Automatically map data based on column headings in source file	Yes	No

Map drop-down list values	Yes	No (To map list values, you must manually edit a data map.)
Set value of **Created On** attribute from source data	No	Yes
Customize Microsoft Dynamics CRM to match data	No (Customization must be performed prior to import.)	Yes (Data Migration Manager can create custom record types and attributes.)
Transform data	No (You must use a one-to-one mapping of attributes.)	Yes (Complex data transformations are possible.)
Send e-mail message to user when task is done	Yes	No

Importing Your Data Using the Import Data Wizard

The Import Data Wizard is useful for importing data you have stored in a spreadsheet or importing leads that you have purchased. It can be used for importing data into most record types. The Import Data Wizard is designed for use by people in sales, marketing, and customer service to use with their own data. All data imported will be owned by the user who does the import, or, if the user has permission to assign records, all records in an import can be assigned to another user.

The data must be in a comma-separated value (CSV) file or in a delimited text (.txt) file with columns delimited by commas. You can export or save data in comma-delimited format from many applications, such as Microsoft Office Excel or Microsoft Office Outlook contacts, and most databases.

If your import file uses column headings that match Microsoft Dynamics CRM display names, the file is automatically mapped. If you frequently import data that is in the same format, you can use a data map to map your data to speed the import process.

Microsoft Dynamics CRM processes imports in the background, and you can select to receive an e-mail message when the import completes. Once an import completes, you can review the records that succeeded or failed to import. You can export failed records into a separate file so that you can fix them, and then try to import them again. Or, you can delete all records associated with an import.

If your system administrator has enabled duplicate detection during import, you can select whether to import duplicates. After an import completes, you also can run a duplicate-detection job to detect potential duplicates.

Migrating Data Using the Data Migration Manager

The Data Migration Manager is a downloadable tool that can be used to migrate data from another customer relationship management system to Microsoft Dynamics CRM. The tool typically is used when Microsoft Dynamics CRM is first installed to migrate data from previous systems, but also can be used later. It can migrate:

- Multiple files containing record types that are related to each other, such as accounts with related contacts
- Records that need to be assigned to different Microsoft Dynamics CRM users

- Notes and attachments

You can delete all records associated with a specific data-migration job.

Data to be migrated must be stored in comma-separated value (CSV) files.

To simplify the migration process, a data map can be used to map data from your source data to Microsoft Dynamics CRM. Data maps can be exported and imported, and can be edited manually if needed.

The data migration tools must be used by a person with the System Administrator security role in Microsoft Dynamics CRM.

More information: Install and Run the Data Migration Manager Back to the top

Work with Imports

▸ Data that can be imported

Data can be imported into system attributes and custom attributes in most record types, and can also be imported into custom record types.

For a complete list of record types you can import into, on the second page of the Import Data Wizard, view the values in the **Record Type** list.

Prepare a file for import

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Follow the guidelines in this topic to ensure that your file imports successfully.

1. Put records for each record type in a separate file.
   You can import only one record type at a time. For ease of use, name the file the same name as the record type in Microsoft Dynamics CRM. For example, put all your contact records in a file named contacts.txt or contacts.csv.
2. Only put records that need to be assigned to one user in each file.
3. The file must be in delimited text format (.txt) with columns separated by commas, or in a comma-separated values (.csv) format.

   You can easily create delimited.txt or.csv format files by using Microsoft Office Excel.

▸ If your file uses only ASCII characters, save the file as a comma-delimited values (.csv) file.

- In Microsoft Office Excel, click **Save As**, and select **CSV (Comma delimited)(*.csv)**.

▸ If your file uses non-ASCII characters, save the file as a Unicode text (.txt) file and change the field separator to commas.

If your import file contains non-ASCII characters, the import file must be in a Unicode or UTF-8 format.

b. In Excel, click **Save As**, and select **Unicode Text (*.txt)**.

c. Use Notepad to open the.txt file.

d. Search for commas in the file. Enclose any data that includes commas with double-quotes. For example:
"23 State Street, Apt 2".

e. Replace all **tab** characters with commas.

   a. In Notepad, select the **tab** character with the keyboard or mouse and press CTRL+C to copy it to the Clipboard.

   b. On the **Edit** menu, click **Replace**.

   c. In the **Find what** box, press CTRL+V to paste the Clipboard contents. This pastes the **tab** character.

   d. In the **Replace with** box, type a comma (,).

   e. Click **Replace All**.

   f. Click **Save As**.

   g. In the **Save as type** box, select **Text Documents (*.txt)**, and in the **Encoding** box, select **Unicode**.

Make sure the first line of the file contains column headings.

Edit your file and add column headings if they are not already present.
If the column headings exactly match attribute display namevalues in Microsoft Dynamics CRM, columns in your source file will be mapped automatically to Microsoft Dynamics CRM columns, which will save time.

Tips

- To identify display name values, open the form for the record type as if you were creating a new record. The labels on the form typically match the display names, although it is possible for your system customizer to have changed the form label values.

  If you have the appropriate security role, you identify display names in the Customization area:

  1. In the Navigation Pane, click **Settings**, click **Customization**, and then click **Customize Entities**.
  2. Open the entity, and then click **Attributes**.

- If you are working in a multi-language environment, automatic mapping of columns uses the display names from the user interface language, set on the **Regional Options** tab of the **Set Personal Options** dialog box. More information: Set Personal Options

Make sure the first column heading is not the name of a record type.

The first column heading in your file cannot be the name of another record type. For example, phone call, task, letter, fax, and appointment records all require a Subject column. As Subject is also the name of a record type, the Subject column must not be the first column in your file.

Make sure data exists for all business-required attributes.

A record will only import if all Microsoft Dynamics CRM business-required attributes are mapped, and if the data exists in each of the source columns that are mapped to the required attributes.

You can either determine the required attributes in advance, or use the Import Data Wizard to identify missing required mappings. In either case, make sure you have required data in each record. To determine which fields are business-required, open the form for the record type as if you were creating a new record, and identify fields that are marked with a red asterisk (*).

The following list shows default business-required fields for commonly imported record types.

- Account: **Account Name**
- Contact: **Last Name**
- Lead: **Topic**, **Last Name**, **Company Name**
- Product: **Default Unit**, **Unit Group**, **Decimals Supported**
- Campaign Response: **Parent Campaign**, **Subject**, **Owner**

If records in your import file should be related to an existing Microsoft Dynamics CRM record, make sure the column heading and data in the column that connects the records is valid.

- The value in the column that refers to another record must be unique in the primary attribute for the related record. The lookup is not case-sensitive.

  For example, if you are importing a contact that you want associated with an existing account, you must have a column in your source file containing the **Account Name** for an existing Microsoft Dynamics CRM account record. If you want to perform automatic mapping, the column heading for this column should be **Parent Customer**.

  The **Parent Customer** attribute can be resolved either to an account or contact. The Import Data Wizard looks for a unique account or contact record. If there is a contact record and an account record that have identical values in the **Account Name** field in the account record and the **Full Name** field in the contact record, the record will not be imported.

- The value in the column can also be a Microsoft Dynamics CRM globally unique identifier (GUID).
- If the column in your source file that is used to create the relationship contains multiple values, edit the data to contain just one value.
  For example, if you are importing e-mail activities, and your source data has a record with multiple values in the **To** column, edit the data to contain just one value.

▸ Example showing sample leads to import

The following lines show what the data might look like for a.csv format file containing leads to import. The first line contains the field names, and the remaining lines are imported as data.

```
Company,Last Name,First Name,Topic,Email,Mobile Phone
Designer Bikes,Groth,Brian,Mountain bikes,someone@example.com,555-555-0112
Major Sporting Goods,Bedecs,Anna,Components,,555-555-0171
```

▸ Example showing sample products to import

The following lines show the minimum amount of data required for a.csv format file containing products to import. The first line contains the field names, and the remaining lines are imported as data. Because Unit Group and Default Unit are record types in Microsoft Dynamics CRM, the values for these columns must map to valid values in Microsoft Dynamics CRM.

```
Product,Unit Group,Default Unit,Decimals Supported
```

```
Front Brakes,Single pair,Unit pair,0
Vest,Clothing,Single article,2
```

Note

By default, the maximum size of the file that you can upload is 4 megabytes (MB). This can be changed by your system administrator. More information: Microsoft Knowledge Base Article 295626

Import records from a file

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

To ensure a successful import, be sure to follow the steps in **Prepare a file for import**.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Imports**.

   – OR –

   On the **Tools** menu, click **Import Data**.

2. On the Actions toolbar, click **New**.
3. Click **Browse** to find the file to import.
4. If you are not using the default delimiters, which for data are double quotation marks (" ") and for fields are commas (,), you can select other symbols as the delimiters.
   Other recognized delimiters for data include: single quotation marks (' ') and none.
   Other recognized delimiters for fields include: colons (:), tabs, and semicolons (;).
5. Click **Next**.
6. Select the record type to import the records to.
7. Determine how the source data will be mapped to Microsoft Dynamics CRM data:
   - If the column headings in your file exactly match Microsoft Dynamics CRM display names Display, an automatic data map will be used, and the word **Automatic** will be entered in the **Data map** box.
   - If the **Data map** box remains empty, check your data file to make sure the column headings are actual display name values from the selected record type, or click the **Lookup** button to select a data map. If you do not yet have a data map, you need to create one, and then return to the wizard. More information: Work with Data Maps
8. In the **Mapping Results** section, if there are any unmapped columns or errors, click **View Details**.
   - If you have columns that cannot be imported, you will see **Ignored columns:** *Count*.
     Two types of columns are ignored: computed columns, such as **Full Name** in the contact record type, and columns for attributes that cannot be created and updated, such as **Created On**, **Created By**, **Modified On**, and **Modified By** in all record types.
   - If you have not mapped all business-required columns, you will see **Unmapped required columns** *Count*.

9. After reviewing the details, if none of them need to be fixed, click **OK**.

   – OR –

   If you need to fix your source file, open your source file and fix the problems, click **Back**, and return to step 3 to select your source file.

10. Click **Next**.
11. In the **Assign To** section, to assign all the records in this import to a different user, click **Lookup**, and select the user.
    This option is not available for organization-owned record types such as Product.
12. By default, if duplicate detection is enabled for this record type, duplicate records are not imported. If you want to import duplicates, select **Import duplicate records**.
    This option is not available if duplicate detection is not enabled or not available for the record type you are importing.
13. Click **Next**.
14. Rename the import job if needed, change the notification options if needed, and then click **Import**. An import job is started in the background. You can continue to work in Microsoft Dynamics CRM while the import runs.

Tips

- The direct import of Microsoft Office Outlook contacts is not supported in Microsoft Dynamics CRM. However, you can export your Outlook contacts to a comma separated value (.csv) file, and then import them into Microsoft Dynamics CRM by using the Import Data Wizard. For more information about how to export items in Outlook, see the Help information in Outlook.
- To pause or postpone an import:
  1. In the Navigation Pane, click **Settings**, and then click **System Jobs**.
  2. Select the scheduled import job, and then on the **More Actions** menu, click **Pause** or **Postpone**.

Note

By default, the maximum size of the file that you can upload is 4 megabytes (MB). This can be changed by your system administrator. More information: Microsoft Knowledge Base Article 295626

Create a data map for use with import

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Data maps created for use with data import are not the same as data maps used for data migration. You cannot use a data migration data map with the Import Data Wizard.

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Data Maps**.
2. To edit a data map, double-click the data map.

   – OR –

To create a new data map, on the Actions toolbar, click **New**, type a name and select the record type that you will use the data map with.

3. Create a sample comma-separated value (CSV) file containing:

- A heading row containing all column headings that might be included in a source file you plan to import.
- Data rows that have data for each Microsoft Dynamics CRM drop-down list attribute. For example, if you are importing leads, lead source data is stored in the **Lead Source** drop-down list attribute in Microsoft Dynamics CRM. You would need one row of data to include every possible lead source used in your source data, such as Web site inquiry, tradeshow, and advertisement.
- File size smaller than 50 KB.

Tip

- One way to create this file is to use a file you intend to import as your sample file. However, the sample file must be smaller than 50 KB.

4. Load your sample file:

a. Click **Attributes**, and then click **Load Sample Data**.

b. Click **Browse**, select the comma-separated value file, click **Open**, and then click **OK**.

The source file column headings will be displayed.

Tip

- The sample file is not saved as part of the data map. You need to load the sample data each time you edit your data map.

Map each source file column heading to a Microsoft Dynamics CRM attribute:

. Under **Source**, select a source file column heading from the **Column Headings** column.

a. Select an attribute from the listed unmapped Microsoft Dynamics CRM attributes.

Important All business-required attributes must be mapped. To identify unmapped business-required attributes, in the **Target** area, in the **Unmapped Attributes** box, select **Business Required**.

b. Click **Map**.

Tips

- To change a mapping, click the source value, and then click **Unmap**.
- To ignore values in a column during import, click the source column heading, and then click **Ignore**.
- To map one source column to multiple Microsoft Dynamics CRM attributes, select one attribute and click **Map**, and then select another attribute and click **Map** again.

- The **Created On** and **Modified On** attributes cannot be imported so they do not appear in the target attribute list.

If you selected any Microsoft Dynamics CRM drop-down list attributes, map all values in each list.
If you didn't select any drop-down list attributes, go to step 7.

. Under **Mappings**, click **List Values**.

a. Under **List Attributes**, select a source file column heading from the **Column Headings** column.

b. Under **Corresponding List Values**, for each item in the **Source** *Record Type* column, select a value from the **Microsoft Dynamics CRM Value** list, and then click **Map**.
The mapped value will appear in the **Target** *Record Type* column.

c. In addition to any values from your sample file, you must also specify a target Microsoft Dynamics CRM value for rows in your source data that have no data in this attribute **(Empty)**, and for rows that contain data that is not mapped **(Unmapped)**.

For example, if you are importing leads, you might want to map any empty or unmapped values in the **Rating** column to **Cold**.

Tips

- If your list of values from your sample file does not appear in the list, under **Mappings**, click **Attributes**, and reload your source sample file.
- If you need additional list values in Microsoft Dynamics CRM, contact your system administrator or system customizer. More information: Requesting User Interface Changes
- Once you have mapped a value, you can change it to another value, but you cannot unmap it.

Click **Save** or **Save and Close**.

View the progress and results of an import, and correct errors

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You must wait for an import job to complete before you can repair failures. If you selected to receive e-mail notification in the Import Data Wizard, you will receive an e-mail message when the import completes.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Imports**.

Monitor the progress of the import. To monitor status for an import, watch the **Status Reason** column. The values will change from **Submitted** to **Parsing** to **Transforming** to **Importing** to **Completed**.

These values correspond with the three stages of each import: parsing the file, transforming the data, and importing the data.

For detailed information about the progress of the import job, double-click the import job record, and then under **Details**, click **System Jobs**. One system job is created for each import stage.

Tip: To refresh the status, click the **Refresh** button .

2. Once an import has completed, view the summary information showing the number of records created and the number of records containing errors.
3. To open the import record to view the records that did not import, double-click the import record.
4. To view rows that were successfully imported, under **Details**, click *Record Types* **Created**.
5. To view rows that were not imported, under **Details**, click **Failures**.

   To export rows that failed to import to a new comma-separated value (CSV) file, click **Export Error Rows**. You can correct the errors in this file, and then import it.

Work with Data Maps

Create a data map for use with import

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Data maps created for use with data import are not the same as data maps used for data migration. You cannot use a data migration data map with the Import Data Wizard.

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Data Maps**.
2. To edit a data map, double-click the data map.

   – OR –

   To create a new data map, on the Actions toolbar, click **New**, type a name and select the record type that you will use the data map with.

3. Create a sample comma-separated value (CSV) file containing:
   - A heading row containing all column headings that might be included in a source file you plan to import.
   - Data rows that have data for each Microsoft Dynamics CRM drop-down list attribute. For example, if you are importing leads, lead source data is stored in the **Lead Source** drop-down list attribute in Microsoft Dynamics CRM. You would need one row of data to include every possible lead source used in your source data, such as Web site inquiry, tradeshow, and advertisement.
   - File size smaller than 50 KB.

▸ Tip

- One way to create this file is to use a file you intend to import as your sample file. However, the sample file must be smaller than 50 KB.

4. Load your sample file:
   a. Click **Attributes**, and then click **Load Sample Data**.

b. Click **Browse**, select the comma-separated value file, click **Open**, and then click **OK**.

The source file column headings will be displayed.

Tip

- The sample file is not saved as part of the data map. You need to load the sample data each time you edit your data map.

Map each source file column heading to a Microsoft Dynamics CRM attribute:

. Under **Source**, select a source file column heading from the **Column Headings** column.

a. Select an attribute from the listed unmapped Microsoft Dynamics CRM attributes.

Important All business-required attributes must be mapped. To identify unmapped business-required attributes, in the **Target** area, in the **Unmapped Attributes** box, select **Business Required**.

b. Click **Map**.

Tips

- To change a mapping, click the source value, and then click **Unmap**.
- To ignore values in a column during import, click the source column heading, and then click **Ignore**.
- To map one source column to multiple Microsoft Dynamics CRM attributes, select one attribute and click **Map**, and then select another attribute and click **Map** again.
- The **Created On** and **Modified On** attributes cannot be imported so they do not appear in the target attribute list.

If you selected any Microsoft Dynamics CRM drop-down list attributes, map all values in each list.
If you didn't select any drop-down list attributes, go to step 7.

. Under **Mappings**, click **List Values**.

a. Under **List Attributes**, select a source file column heading from the **Column Headings** column.

b. Under **Corresponding List Values**, for each item in the **Source** *Record Type* column, select a value from the **Microsoft Dynamics CRM Value** list, and then click **Map**.
The mapped value will appear in the **Target** *Record Type* column.

c. In addition to any values from your sample file, you must also specify a target Microsoft Dynamics CRM value for rows in your source data that have no data in this attribute **(Empty)**, and for rows that contain data that is not mapped **(Unmapped)**.

For example, if you are importing leads, you might want to map any empty or unmapped values in the **Rating** column to **Cold**.

Tips

- If your list of values from your sample file does not appear in the list, under **Mappings**, click **Attributes**, and reload your source sample file.
- If you need additional list values in Microsoft Dynamics CRM, contact your system administrator or system customizer. More information: Requesting User Interface Changes
- Once you have mapped a value, you can change it to another value, but you cannot unmap it.

Click **Save** or **Save and Close**.

Export a data map

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Data Maps**.
2. On the Actions toolbar, click **Export**.
3. In the **File Download** dialog box, click **Open** or **Save**.

Notes

- Data maps created for use with data import are not the same as data maps used for data migration. You cannot use a data migration data map with the Import Data Wizard.
- Exported XML files containing data maps can be edited manually. The complete syntax can be found in the Data Map Schema section of the *Microsoft Dynamics CRM 4.0 Software Development Kit*.

Import a data map

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In the Navigation Pane, click **Settings**, click **Data Management**, and then click **Data Maps**.
2. On the Actions toolbar, click **Import**.
3. In the **Import Data Map** dialog box, type the name of the file to import, or click **Browse** and locate the file, and then click **OK**.
   A data map must be a well-formed and valid XML file.

Notes

- Data maps created for use with data import are not the same as data maps used for data migration. You cannot use a data migration data map with the Import Data Wizard.
- Exported XML files containing data maps can be edited manually. The complete syntax can be found in the Data Map Schema section of the *Microsoft Dynamics CRM 4.0 Software Development Kit*.

Tip

If you create a data map that you think will be useful for other users in your organization, you can share it. More information: Share or Assign Records

Install and Run the Data Migration Manager

Concepts:

- Importing Data

Install and run the Data Migration Manager

Can I do this task?

This task requires the System Administrator security role, and you must also be in the local Administrators group on the computer on which you are installing Data Migration Manager. More information about specific permissions and performing this task while offline: Configuration Permissions

The Data Migration Manager is included on the Microsoft Dynamics CRM Client CD.

1. Install Data Migration Manager:
    a. On the computer on which you plan to install Data Migration Manager, use Microsoft Internet Explorer to browse to your Microsoft Dynamics CRM server.
    If you cannot use Microsoft Dynamics CRM from this computer, you will not be able to install and use Data Migration Manager on this computer.
        - If the Microsoft Internet Explorer **Connect to** dialog box is displayed, select the **Remember my password** check box.
        - If you are using Windows Vista:
            a. In **Control Panel**, click **User Accounts**, and then click **Manage Your Network Passwords**.
            b. In the **Store User Names and Passwords** screen, click **Add**.
            c. In the **Store Credential Properties** screen, specify the name of your Microsoft Dynamics CRM server.
            d. In the **Credential type** section, select **A Web site or program credential**, click **OK**, and then click **Close**.
    b. Insert the Microsoft Dynamics CRM Client CD, and double-click Setup.exe.
    c. On the Setup screen, click **Install Microsoft Dynamics CRM Data Migration Manager**, and follow the instructions in the setup wizard.
        - If you choose to install Microsoft SQL Server Express, note that it cannot be installed on a compressed drive.
        - If you choose to use an existing SQL Server, note that it must be in the same domain as the computer on which you are installing Data Migration Manager.
2. Configure Data Migration Manager:

a. On the **Start** menu, point to **All Programs**, point to **Microsoft Dynamics CRM**, and then click **Data Migration Manager**.
It takes the Data Migration Manager a few minutes to start the first time.

b. Complete the steps in the configuration wizard.

Note: If you are using a computer running Microsoft SQL Server rather than Microsoft SQL Server Express, by default the configuration wizard will attempt to connect to the **CRM** instance on your server. If you prefer to use a different instance, on the **Specify SQL Server** page, specify the instance name in the format *server_name******instance_name*.

3. Start the Data Migration Manager:

- On the **Start** menu, point to **All Programs**, point to **Microsoft Dynamics CRM**, and then click **Data Migration Manager**.

Notes:

- Data Migration Manager cannot be used while Microsoft Office Outlook is running.
  If you have closed Outlook, and get an error message stating that Outlook is still running, you need to use Task Manager to stop the Outlook.exe process.
- Data Migration Manager can only be used by the person who installs it.

Note

For information about how to prepare your files for data migration, and for help troubleshooting Data Migration Manager configuration, after Data Migration Manager is installed, on the **Start** menu, point to **All Programs**, point to **Microsoft Dynamics CRM**, and then click **Data Migration Manager Help**.

Analyzing Information

Running Reports and Analyzing Data

When you want to analyze data or view a report in Microsoft Dynamics CRM, there are several ways to view the relevant data:

- Run a default report. More information: Default Reports
- Use Advanced Find to search for the subset of data you need. Then export the results list to a static or dynamic Microsoft Office Excel worksheet or a PivotTable for further analysis. Once the data is exported, you can create your own Microsoft Office Word file and mail-merge the data. More information: Export Data to Excel
- Create your own report:
  - Use the Report Wizard to create a new Reporting Services report. The wizard helps you group and summarize data, create charts and tables, and generates an easily printable report. More information: Create, Edit, or Copy a Report Using the Report Wizard
  - Add any exported Excel file as a personal report, and share it with your colleagues if appropriate.

    Or, ask your system administrator or system customizer to add any exported Excel file as a report available to everyone in your organization.

    If the Excel file is dynamic, the data in the file will be refreshed any time the file is opened, and each person who runs the report will see data that only they have permission to see. More information: Customizing and Organizing Reports

- Add any file or link to a Web page as a personal report, and share it with your colleagues if appropriate. More information: Customizing and Organizing Reports
- Write a new report using Microsoft Office Excel, Microsoft SQL Server Reporting Services, or other ODBC-compliant reporting tools. Add it as a personal report, and share it with your colleagues if appropriate. More information: Write a Report Using Report-Writing Tools

Reports can be used when Microsoft Dynamics CRM for Outlook is offline. More information: Working Offline

Work with Advanced Find

Create, edit, or save an Advanced Find search

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. On the Standard toolbar, click **Advanced Find**.

   Tip: Advanced Find starts with criteria based on where you are in Microsoft Dynamics CRM. If you click **Advanced Find** from a view, the criteria for that view will be preloaded for you.

   – OR –

   To edit a saved search, on the Standard toolbar, click **Advanced Find**, click the **Saved Views** tab, and then double-click the saved view.

2. Specify the search criteria.

   - If **Show Details** is visible in the criteria toolbar, click it.

▸ Specify what to search for

b. In the **Look for** list, select the type of record you want to search for, such as **Accounts**, **Leads**, or **Users**.

c. Click **Select** to select criteria for the search, including the field to search on (for example, **Account Name** or **City**), the query relational operator, and the values to locate (for example, "Seattle" or "E-mail").
You can select fields from the current record type, or from related records.

- For some values, you can click the **Lookup** button to open the **Select Values** dialog box and select the value you want.

At the bottom of the **Select** list, the **Related** section shows related record types. When you select a related record type, a new **Select** link appears to select fields from this related record type.

▸ Clear, delete, or group search criteria clauses

- Clear all search criteria to start over.

a. Click **Clear** to remove all criteria.

b. In the confirmation message, click **OK**.

- Delete a row of search criteria.

. Click the **Options menu** button next to a search criteria row, and then click **Delete**.

a. In the confirmation message, click **OK**.

- Group criteria.

. Click the **Options menu** button next to a search criteria row, and then click **Select Row**. To group search criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify search criteria for these fields can be grouped. However, rows with field values from **Account** and **Opportunity** record types cannot be grouped.

a. On the Filter toolbar, select **Group AND** or **Group OR**.

b. Repeat steps a and b to create additional criteria groups.

- Select and deselect grouped criteria.

. Click the **Options menu** button next to a search criteria row that has been selected, and then click **Deselect Row**. You can unselect rows from a group or individually.

a. Click the **Options menu** button next to the group, and then click **Select Group** to select a group, or click **Deselect Group** to unselect a group that has been previously selected.

- Add a search criteria clause to a criteria group.

. Click the **Options menu** button next to the group, and then click **Add Clause**.

a. Add search criteria to the new clause.

- Ungroup rows of criteria that you have grouped together using **Group AND** or **Group OR**.

. Click the **Options menu** button next to the group you want to ungroup, and then click **Ungroup**.

a. Repeat this step to ungroup additional search criteria groups.

- Change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group.

. Click the **Options menu** button next to the group, and then click **Change to OR** or **Change to AND**.

a. Repeat this step to change additional search criteria groups.

- Hide or delete a row in Simple view:

. To hide a row, click the **Options menu** button next to a search criteria row, and then click **Hide in Simple Mode**.

a. To make a hidden row visible, click **Show in Simple Mode**

Specify the columns to include in the search results.

. Click **Edit Columns**, and then click **Add Columns**.

a. Select the record type that includes the columns you want to add.

b. Select the check box next to the columns you want to add. If a column isn't listed, contact your system administrator.

c. Click **OK**.

d. The following options are also available:

- To adjust the width of a column, click the column, click **Change Properties**, select a width, and then click **OK**.
- To reorder columns, select a column, and use the arrow keys to move it to the left or right.
- To remove a column, select it, and then click **Remove**.

e. Click **OK**.

Specify the sort order.

- Click **Edit Columns**, click **Configure Sorting**, and specify the column to sort on, and the sort order.
  Tip: Each view is sorted by only one column. However, after you click Find, you can sort by additional columns. To sort a search results list by an additional column, press SHIFT while you click the additional column header.
  You can only sort on columns from the primary record record type.

Save the search as a saved view.

. If you're saving an existing saved view, click **Save**. If you are saving a new view or want to change the name of the view because you changed the criteria, click **Save As**.

a. In the **Query Properties** dialog box, in the **Name** field, type a name for the search.

b. In the **Description** box, type a brief description, and then click **OK**.

The search is saved as a view and appears on the **Saved Views** tab of the Advanced Find form. This new view is also available from the list page for the record type in the **View** box, in the **My Views** section.

Click **Find**. The selected records are displayed.

Click **Back to Query** to return to the **Find** tab.

Tips

- When you specify search criteria to find activity records, you can either search through all types of activities or select one type of activity to search, such as Task or Appointment.
- The columns that are displayed by default are controlled by the Advanced Find View for the record type. More information: Work with Entities.
- If you need to search based on the names of people who participated in an activity, in the Advanced Find criteria, you must search fields in the related activity party. You can search based on the person's name (**Party** field), or by their role in the activity, such as sender or recipient (**Participation Type** field).

  For example, to find e-mail messages sent to a specific contact:

  a. In the Activities list, in the **Type** box, select **E-mail**.
  b. Click **Advanced Find**, and then click **Show Details**.
  c. Click **Select**, and then in the **Related** section, select **Activity Parties (Activity)**.
  d. Under **Activity Parties (Activity)**, click **Select**.
  e. In the **Fields** section, click **Participation Type**, click **Enter Value**, and then click the **Select Values** button .

f. In the **Available Values** list, select **To Recipient**, click the **Add Selected Records** button , and then click **OK**.

g. Under **Activity Parties (Activity)**, click **Select**.

h. In the **Fields** section, click **Party**.

i. Click the **Equals Current User** operator, and change it to **Equals**.

j. Click **Enter Value**, and then click the **Lookup** button .

k. In the **Look for** box, select **Contact**, enter some letters to search for, and then click **Start search**.

l. Select the contact, click the **Add Selected Records** button , and then click **OK**.

m. In the **Advanced Find** page, click **Find**.

Note

You cannot use Advanced Find to find records related to quick campaigns.

Working with saved Advanced Find searches

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

- You can run, share, assign, delete, or deactivate a saved view that you own.

  If another user has shared a saved view with you, what you can do will depend on the specific privileges they have given to you: Share, Assign, Delete, or Write.

Run a saved search

On any list page in the **View** box, in the **My Views** section, select a saved view.
If there is not a **My Views** section, there are no saved searches for this record type.

– OR –

On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab. Double-click a saved search, and then click **Find**.

Share a saved search

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view. On the Actions toolbar, click **More Actions**, and then click **Sharing**.
3. In the sharing dialog box, under **Common Tasks**, click **Add User/Team**.
4. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
5. In the **Search for records** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .

6. In the list of available records, click a user or team to select it, and then click the **Add Selected Records** button to add the user or team to the **Selected records** list.
7. Click **OK**.
8. In the sharing dialog box, select the type of share access that you want. The available permissions are: Read, Write, Delete, Append, Assign, or Share.
9. Click **OK**.
   The saved view will show up in the **My Views** section of your coworker's **View** list.

Tips

- To cancel any changes that you have made and retain the previous permissions settings, click **Reset**.
- To select or clear all permissions on a selected item, click **Toggle All Permissions of the Selected Items**.

Assign a saved search

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the Actions toolbar, click the **Assign** button .
3. In the **Assign** dialog box, click:
   - **Assign to me**
     Use this option to assign the record to yourself.

     – OR –

   - **Assign to another user**

     Click the **Lookup** button , type a part of the user's name, click the **Find** button , double-click the user's name, and then to close **Look Up Records** dialog box, click **OK**.
4. Click **OK**.

Deactivate a saved search

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the **More Actions** menu, click **Deactivate**.

Delete a saved search

1. On the Standard toolbar, click **Advanced Find**, and then click the **Saved Views** tab.
2. Select the view, and then on the Actions toolbar, click the **Delete** button .

E-mail or copy a link to a saved search

Send a shortcut in an e-mail

l. On the Actions toolbar, click **Send Shortcut**, and then click **Of Current View**.

m. Complete the e-mail form and send.

Copy a shortcut

n. On the Actions toolbar, click **Copy Shortcut**, and then click **Of Current View**.

o. Paste the shortcut into any application that supports copy and paste. For example, in Microsoft Office Word, press CTRL+V.

More information: Send or Copy a Shortcut

Export Data to Excel

You can export any list to Microsoft Office Excel, including the results of an Advanced Find search.

You can export to a static or dynamic Excel worksheet or to a PivotTable.

Export data to an Excel static worksheet

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In any area with a list of records, select the columns to include in the exported list.
   By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.

   To make changes to the columns in an Advanced Find View, click **Edit Columns**. You can make the following types of changes:

▸ Change the column order

To change the column order, select a column heading, such as **Account Name**, and then under **Common Tasks**, click the **Move Left** button or the **Move Right** button to move the column.

▸ Add columns

a. To add columns to the export list, click **Add Columns**.

b. To add columns for the main record type, select it, and then in the **Add Columns** list, click to select fields that you want to add as columns.

c. To add columns from related records, first select the related record type, and then in the **Add Columns** list, click to select fields that you want to add as columns.

d. Click **OK**.

Configure sorting

To change the sort order, click **Configure Sorting**, in the **Column** list, select the column that you want to sort, in the **Order** area, click **Ascending Order** or click **Descending Order**, and then click **OK**.
You cannot sort on columns from related record types.

Change column width

To change the column width that will appear in the Excel worksheet, select a column heading, such as **Account Name**, click **Change Properties**. In the **Change Column Properties** dialog box, select the width (in pixels) that you want, and then click **OK**.

Remove columns

To remove a column, select the column heading that you want to remove, and under **Common Tasks**, click **Remove**, and then in the confirmation message, click **OK**.

You cannot change the columns for a system view, such as **All Active Accounts**. You must either customize the view, which requires the System Administrator or System Customizer security role, or use Advanced Find to create your own view based on the current view. To create your own view, with the system view open, click **Advanced Find**.

2. On the Actions toolbar, click the **Export to Excel** button .
3. In the **Export Data to Excel** dialog box, select **Static worksheet with records from this page**.

   – OR –

   Select **Static worksheet with records from all pages in the current view**.
   This option will be visible only when your view includes more than one page of records.
4. Click **Export**.
5. To view the static worksheet, click **Open**.
   If you are using Microsoft Office Excel 2007, you will see a message that says the file you are trying open is in a different format than specified by the file extension. Click **Yes**.
6. To save the exported data to a file, in Excel, on the **File** menu, click **Save**.

Tip

You can e-mail a static exported worksheet to anyone, or store it in a shared file. Anyone who opens the file will see all the data in the file, whether or not they are a Microsoft Dynamics CRM user or have privileges to view the data in Microsoft Dynamics CRM.

Notes

- There is potential for data loss if you export from Microsoft Dynamics CRM to a Microsoft Office Excel 2003 comma-separated value (CSV) file.

To ensure that the file is exported correctly, you must have data in every row of the last column of the list you are exporting. You can add a space or other character in last column of the file or reorder the columns so that the last column always contains data. More information: Microsoft Knowledge Base Article 77295

- By default, in Microsoft Dynamics CRM, you cannot export a list of more than 10,000 records at a time to a static Excel worksheet. Your system administrator can change this. More information: Microsoft Knowledge Base Article 911395
- By default, Microsoft Dynamics CRM lists up to 50 records per page. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.

Export data to an Excel PivotTable

1. In any area with a list of records, on the Actions toolbar, click the **Export to Excel** button .
2. Click **Dynamic PivotTable**.
3. To add or remove a column in the report, click **Select Columns**.
4. In the **Select PivotTable Columns** list, select or clear the check boxes for the fields as needed, and then click **OK**.

   By default, only fields that are displayed in the **Select PivotTable Columns** list are included in the PivotTable Field List.

5. Click **Export**.
6. Open the file containing the PivotTable:
   a. To view the PivotTable, click **Open**.
   b. If you are using Microsoft Office Excel 2003, click **Enable automatic refresh**.

      – OR –

      If you are using Microsoft Office Excel 2007:

      - You will see a message that says the file you are trying open is in a different format than specified by the file extension. Click **Yes**.
      - If you see the security warning **Data connections have been disabled**, click **Options**, and then click **Enable this content**, and then click **OK**.
7. Drag the fields from the **PivotTable Field List** to the PivotTable. For more information, see Microsoft Office Excel Help.
8. To refresh data in the file:
   - In Microsoft Office Excel 2007, click the **Data** tab, and in the **Connections** area, click **Refresh All**.
   - In Microsoft Office Excel 2003, on the **Data** menu, click **Refresh Data**.

   To save the exported data to a file, in Excel, on the **File** menu, click **Save**.
   Each time you open the file, you have the option to refresh data from the Microsoft Dynamics CRM database.

Tips

- If you export a dynamic worksheet or PivotTable that you think will be useful to other Microsoft Dynamics CRM users, you can add the list as a report, and then share it with others, or make it available to all Microsoft Dynamics CRM users.
- If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can e-mail a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.

Notes

- There is potential for data loss if you export from Microsoft Dynamics CRM to a Microsoft Office Excel 2003 comma-separated value (CSV) file.

  To ensure that the file is exported correctly, you must have data in every row of the last column of the list you are exporting. You can add a space or other character in last column of the file or reorder the columns so that the last column always contains data. More information: Microsoft Knowledge Base Article 77295

- You must use Microsoft Office Excel XP, Excel 2003, or Excel 2007 to export a list to a PivotTable.
- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

Export data to an Excel dynamic worksheet

1. In any area with a list of records, on the Actions toolbar, click the **Export to Excel** button .
2. Click **Dynamic worksheet**.
3. By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.

   To make changes to the columns, click **Edit Columns**. You can make the following types of changes:

▸ Change the column order

To change the column order, select a column heading, such as **Account Name**, and then under **Common Tasks**, click the **Move Left** button or the **Move Right** button to move the column.

▸ Add columns

a. To add columns to the export list, click **Add Columns**.

b. To add columns for the main record type, select it, and then in the **Add Columns** list, click to select fields that you want to add as columns.

c. To add columns from related records, first select the related record type, and then in the **Add Columns** list, click to select fields that you want to add as columns.

d. Click **OK**.

Configure sorting

To change the sort order, click **Configure Sorting**, in the **Column** list, select the column that you want to sort, in the **Order** area, click **Ascending Order** or click **Descending Order**, and then click **OK**.
You cannot sort on columns from related record types.

Change column width

To change the column width that will appear in the Excel worksheet, select a column heading, such as **Account Name**, click **Change Properties**. In the **Change Column Properties** dialog box, select the width (in pixels) that you want, and then click **OK**.

Remove columns

To remove a column, select the column heading that you want to remove, and under **Common Tasks**, click **Remove**, and then in the confirmation message, click **OK**.

4. Click **OK**, and then click **Export**.
5. View the file containing the dynamic worksheet:
    a. To view the worksheet, click **Open**.
    b. If you are using Microsoft Office Excel 2003, click **Enable automatic refresh**.

    – OR –

    If you are using Microsoft Office Excel 2007:

    - You will see a message that says the file you are trying open is in a different format than specified by the file extension. Click **Yes**.
    - If you see the security warning **Data connections have been disabled**, click **Options**, and then click **Enable this content**, and then click **OK**.
6. To refresh data in the file:
    - In Microsoft Office Excel 2007, click the **Data** tab, and in the **Connections** area, click **Refresh All**.
    - In Microsoft Office Excel 2003, on the **Data** menu, click **Refresh Data**.

    To save the exported data to a file, in Excel, on the **File** menu, click **Save**.
    Each time you open the file, you have the option to refresh data from the Microsoft Dynamics CRM database.

Tips

- If you export a dynamic worksheet or PivotTable that you think will be useful to other Microsoft Dynamics CRM users, you can add the list as a report, and then share it with others, or make it available to all Microsoft Dynamics CRM users.

- If the recipients are in the same domain as you, and are Microsoft Dynamics CRM users, you can e-mail a dynamic Excel file, or store it as a shared file. When recipients open the dynamic file, they will see data they have permission to view in Microsoft Dynamics CRM, so the data they see may be different from what you see.

Notes

- There is potential for data loss if you export from Microsoft Dynamics CRM to a Microsoft Office Excel 2003 comma-separated value (CSV) file.

  To ensure that the file is exported correctly, you must have data in every row of the last column of the list you are exporting. You can add a space or other character in last column of the file or reorder the columns so that the last column always contains data. More information: Microsoft Knowledge Base Article 77295

- Some system views, such as Accounts: No Campaign Activities in Last 3 Months, can be exported only to a static Excel worksheet.

Run a Report

Run a report

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Find and open a report:

▸ From the Reports area

a. In the **Workplace**, under **My Work**, click **Reports**.

b. To narrow the list, enter the first few letters of the report name, or use the asterisk (*) wildcard in the **Search for records** box and then click the **Find** button . You can also select a view.

c. In the reports list, double-click the report that you want to run.

If the report has a default filter, the default filter will be displayed. Follow step 2 to change the filter.
Tip: To run a report without seeing the default filter, select the report, and then on the Actions toolbar, click **More Actions**, and then click **Run Report**.

▸ From a list of records, including the results of an Advanced Find search

Only reports that relate to the current record type will be available.
You can run some reports on all records in the list, up to ten selected records, or without limiting the records as if you were running the report from the Reports area.

- To run a report on all records on the list:

  a. On the Actions toolbar, click **Reports** .

b. Under **Run on Selected Records**, click the name of the report.

c. In the **Select Records** dialog box, click **All records on all pages in the current view**, and then click **Run Report**.

- To run a report on up to ten selected records from the list:

  a. Select the records to include. Select several records by pressing the CTRL key while you click each record.

  b. On the Actions toolbar, click **Reports**.

  c. Under **Run on Selected Records**, click the name of the report.

  d. In the **Select Records** dialog box, click **The selected records**, and then click **Run Report**.

- To run a report without limiting records to items on the list:

  a. On the Actions toolbar, click **Reports**.

  b. If the report is listed under **Run on All Records**, select the report.

  – OR –

  Under **Run on Selected Records**, click the name of the report. In the **Select Records** dialog box, click **All applicable records**, and then click **Run Report**.

  – OR –

  If the report you want to run is not listed, you must go to the Reports area to run the report.

▸ From a record

Only reports that relate to the current record type will be available.

To run a report including data from just one record:

a. With a record open, on the Actions toolbar, click **Reports** .

b. Under **Run on Current Record**, click the name of the report.

▸ From Microsoft Dynamics CRM for Outlook

All reports can be run when you are online.

To run a report while you are offline, you must first create a local data group that includes the report, as well as a local data group that includes any data that should be included in the report.

To create a local data group that contains reports, on the **CRM** menu, click **Modify Local Data Groups**, click **New**, select the **Report** record type, and then define the criteria for which reports to include. More information: Work with Data to Take Offline

- To run reports from the Reports area, in the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, click **Workplace**, click **My Work**, click **Reports**, and then select a report to run.

- To select a report from a record or list, follow the procedures above. These steps work the same way in Microsoft Dynamics CRM for Outlook.

▸ From a report you saved locally

If you have saved a report on your computer or shared file system that reads dynamic data from Microsoft Dynamics CRM, to open it, browse to the folder that contains your saved report, and double-click the file.

If the report offers filter criteria, if needed, modify the filter criteria and then click **Run Report**.

The list of existing report filtering criteria is grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**.

To edit a parameter in simple mode, click the underlined value and enter a new value.

– OR –

To edit the filter criteria in detailed mode:

. Click **Edit Filter**.

a. To add a criteria row:

1. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
2. Click the query relational operator, and select an operator.
3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.

b. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

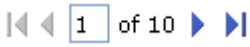
0. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.
1. On the Filter toolbar, select **Group AND** or **Group OR**.
2. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
3. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
4. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
5. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.
6. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.
7. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

▸ Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button for that row, and then click **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click the **Options menu** button for that row, and then click **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click the **Options menu** button for that row, and then click **Show in Simple Mode**.
- You can set your personal options so that report filters and Advanced Find criteria always open in simple or detailed mode. More information: Set Personal Options

If the report offers parameters, if needed, modify the parameters and then click **View Report**.

Locate data in the report.

- To view or change a record, click the first field in the row for the record. A separate Microsoft Dynamics CRM window will open with the record.
- To view all records associated with a summary or chart report, click **Show All** at the bottom of the report. To navigate back to the original report, click **Original Report** in the report title area.
- To view detailed information about an area in a chart, click an area of the chart. To navigate back to the original report, click **Original Report** in the report title area.
- To page through the report, on the Report toolbar, use the **Page Navigation** buttons 

. To locate a specific page, type a page number in the box and then press **Enter**.
- To quickly locate specific information in your report, in **Find | Next**, type a few characters, and then click **Find**.
- To sort a column, click the column title. The direction of sorting is indicated by the **Ascending sort** button or the **Descending sort** button .
- To view or hide the filter summary, expand or collapse **Filter Summary**.
- To update your report, click the **Refresh** button .
- To hide the report parameters, click the **Hide Parameters** button . To display the report parameters, click the **Show Parameters** button .

Print the report. On the Report toolbar, click the **Print** button .

If you are working offline using Microsoft Dynamics CRM for Outlook, on the Report toolbar, select **Web archive** format, click **Export**, and then on the **File** menu, click **Print**.

Tips

- If a chart doesn't display the first time you export a report to **Web archive** format, export the report a second time.
- To print reports, you need a Reporting Services Microsoft ActiveX control. The first time you print a Reporting Services report from either Microsoft Dynamics CRM or Microsoft Dynamics CRM for Microsoft Office Outlook, you will see a prompt **Do you want to install this software?**.

To install the required control, click **Install**.

Export the report.

Important The exported report is temporary. If you need to save the exported report to a local file, use the viewing program to save the file to disk. The saved exported report is no longer connected to Microsoft Dynamics CRM. Therefore, it does not change if Microsoft Dynamics CRM data changes.

. In the **Export** box, select a format, and then click **Export**.
A second browser window is used to display the report, using a viewer associated with the export format you selected.
The formats that are available are determined by the rendering extensions that are installed on the Microsoft SQL Server Reporting Services report server, and also by whether you are online or offline.

- If you are working offline, only the **Excel** and **Acrobat (PDF) file** formats are available.
- If you are using Microsoft SQL 2005 Workgroup edition, the **XML file with report data** format is not available.

If a viewer is not available for the format you select, you must select a different format or install the viewer.
The following export formats are included in a default installation when you are online. The list of export formats available to you may vary from those listed here.

- **Excel**
  View the report in Microsoft Office Excel. This format includes all the row, column, and field labels, in addition to report formatting.
  Large reports and reports with charts might not display with the expected formatting when exported in this file format. To export only the data, instead of using this format, from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, export the data into Microsoft Office Excel, and then save as a comma-delimited (CSV) file. More information: Export Data to Excel
- **Web archive**
  View the report in Microsoft Internet Explorer, as a MIME-encoded HTML format that keeps images and linked content together with a report. For chart reports, if the chart is not displayed correctly the first time that you export the report, export the report again.
  Choose this format to view a report offline or for e-mailing the report.
- **Acrobat (PDF) file**
  View the report using a client-side PDF viewer. You must have Adobe Acrobat Reader to use this format.
  Choose this format for long reports, paginated reports, or reports that are delivered as a file.
- **TIFF file**
  View the report in the default TIFF viewer. For some Windows clients, this is the Windows Pictures and Fax Viewer.
  Choose this format to a view a report in a page-oriented layout. The TIFF format is the recommended format for printing reports.

- **CSV (comma delimited)**
  View the report as a text file, with fields separated by commas. This format includes all the row, column, and field labels.
  To export only the data, instead of using this format, export data from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, into Microsoft Office Excel, and then save as a comma-delimited (CSV) file.
- **XML file with report data**
  View the report as an XML file.

Tips

- If there is no report that gives you the information you need, you can either export data to Microsoft Office Excel, or create your own report. More information: Export Data to Excel, Create and Work with Reports
- If a snapshot of a Reporting Services report exists, you can view it from the Reports area. To see if any snapshots exist for a report, click the **View Snapshots** button next to the report. If a snapshot exists, click the snapshot link to view the snapshot.

Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: Set Personal Options

Default Reports

Microsoft Dynamics CRM has four categories of default reports: sales, marketing, service, and administrative.

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

Sales

The following default sales reports are available:

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.

- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report
  Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.
- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

Marketing

The following default marketing reports are available:

- Campaign Activity Status Report
  Use this report to track a campaign. The report displays a summary for one campaign, including planned and actual time parameters, parent campaign details, and definition status.
- Campaign Comparison Report
  Use this report to identify your most and least successful campaigns. The report compares two campaigns based on parameters such as cost effectiveness and number of responses.
- Campaign Performance Report
  Use this report to track the progress and status of your campaigns. The report provides a detailed

view, including all the dates, targets, definitions, responses, and financial returns from each campaign.

Service

The following default service reports are available:

- Case Summary Table Report
  Use this report to find out what kind of cases are being opened and resolved. You can select how data is grouped in both the rows and columns in this report. This report provides a chart of cases, organized by status reason, owner, priority, subject, customer, or product.
- Neglected Cases Report
  Use this report to identify cases that have not been contacted recently. The report displays a chart of cases that have had no changes to activities, notes, or the case itself in the specified number of days, and no scheduled activities.
- Service Activity Volume Report
  Use this report to review the patterns in service activity volume. The report displays either the duration of or number of service activities, grouped by services, resources, time periods, and additional criteria.
- Top Knowledge Base Articles Report
  Use this report to identify the most frequently used knowledge base articles. The report displays a chart grouped by the subject of the article or case, or by the product associated with the case.

Administrative

The following default administrative report is available:

- User Summary Report
  Use this report to identify contact information and Microsoft Dynamics CRM security roles for all Microsoft Dynamics CRM users.

Customizing and Organizing Reports

Microsoft Dynamics CRM includes default reports for many common business needs. However, most organizations customize the default reports and add custom reports for specific needs. To customize reports, you need to understand:

- Report ownership
- Report types
- Data security
- Options for creating new reports
- Options for modifying existing reports

Report Ownership

Reports can be owned by the system or by individual users. System reports are available to all users. Reports owned by individual users can be shared with specific colleagues or teams, or can be made available to the organization so that all users can use them.

Report Types

All default Microsoft Dynamics CRM reports and all reports created using the Report Wizard are Microsoft SQL Server Reporting Services reports. In addition, reports can also be:

- Web links
- Static files
- Dynamic files that read data from the Microsoft Dynamics CRM database such as Microsoft Office files, Reporting Services reports, or reports created with other ODBC-compliant reporting tools.

For each report, you can edit the report properties, including:

- The type of report
- The file name or URL
- The display name
- The description
- Information about where the report is displayed in the user interface.

Data Security

All reports read Microsoft Dynamics CRM data from filtered views, which filter the data based on the user's security role. Reports only display data that the person running the report has permission to view.

Options for Creating New Reports

To create a new report, users with appropriate permissions can:

- Add a file or a link to a Web page as a report.
- Run the Report Wizard to create a new Reporting Services report. The Report Wizard can create table and chart reports, including drill-through reports and top N reports.
- Write a new report using Reporting Services, Microsoft Office, or another ODBC-compliant reporting tool. Creating a new Reporting Services report requires a report development environment. More information: Create and Work with Reports, Write a Report Using Report-Writing Tools

  When you connect to the Microsoft Dynamics CRM database to write your own report, you must use the filtered views to ensure data security. Filtered views exist for all record types. When a new record type is created, a new filtered view is automatically created.

Options for Modifying Existing Reports

For existing reports, users with appropriate permissions can:

- Organize reports into categories to control which views in the Reports area display each report.
- Determine where a report is visible in the user interface, and edit other properties of the report.
- Edit a report created with the Report Wizard.
- Edit a default report. For example, if you customize Microsoft Dynamics CRM, you might need to modify labels or add or remove fields in default reports. Editing a default report requires a report development environment. More information: Create and Work with Reports, Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)
- Edit the default filter for a default report, a report created with the Report Wizard, or other Reporting Services reports.
- Create a one-time snapshot for a Reporting Services report or schedule a Reporting Services report to run at set intervals.

- Share a personal report with other users, or make it available to everyone in your organization.
- Publish a report so that it is available for use with external applications such as Microsoft SharePoint or custom programs.

Create, Edit, or Copy a Report Using the Report Wizard

Create, edit, or copy a report using the Report Wizard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

How to determine which record types have the data you need

There is one record type for each type of data, such as accounts, contacts, or services.

In addition, there are separate record types for:

- Notes. Every note and attachment is stored as a separate record in the Notes record type.
- Close activities. Whenever you close an opportunity, quote or order, an activity is created that tracks the reason for closing the record. These are stored respectively in the Opportunity Close Activity, Quote Close Activity, and Order Close Activity record types. When you close a case, the data is stored in the Case Resolution Activity.

If your report includes data from communication activities, you have two options:

- If you want data about multiple types of communication activities in one report such as the activity subjects and due dates for all types of activities, use the Activity record type.
- If you need specific information about a specific type of activity, such as the recipients, use the Task, E-mail Message, Fax, Appointment, Letter, or Phone Call record type.

Tip:

- While you are creating your report, keep a window open showing a record from the data type you are including in your report. It will help you determine which columns to include.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. To add a new report, click **New**, and then click **Report Wizard**.

   – OR –

   To edit an existing Report Wizard report, select the report, on the Actions toolbar, click **Edit Report** , and then click **Report Wizard**.
   You can only use the Report Wizard to edit reports that were created with the wizard.

3. Select a starting point for your report.
   a. To create a new report, select **Start a new report**.

– OR –

To start from a copy of an existing report, select **Start from an existing report**, select the report, and also clear the **Overwrite existing report** check box.

– OR –

To edit an existing report, select **Start from an existing report**, select the report, and check the **Overwrite existing report** check box.

b. If multiple languages are installed, select the language to use for column names, record types, and wizard-generated text in the report.

c. Click **Next**.

4. Enter the name of the report, and specify which record types the report will use.

The purpose of this step is to identify where the data in the report comes from. You can include data from one or two record types, plus data from related records.

a. Enter data in each field:

- **Report name**. This value will be displayed on the **Reports** menu and in the Reports area.
- **Primary record type**. Data from all fields in this record type and related record types will be available when you are defining criteria for which records to include. Data from this record type will be available when you are selecting fields to display.
- **Related record type**. If you need to display data from a related record type, select an additional record type here.

  Tip: If you don't need data from a related record type, don't select one, as it makes the report take longer to load.

b. Click **Next**.

5. Specify which records to include.

The purpose of this step is to determine which records are included in your report. This information is saved as the default filter for the report.

You can select criteria based on the selected record types or on columns from related records.

a. To include only records defined by an existing system view or saved view, select a view.

– OR –

To define which records to include by selecting criteria:

- To add a criteria row:
  1. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
  2. Click the query relational operator, and select an operator.
  3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.

- To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

a. For each row you want to group, click the **Select Row** button for that row, and then click **Select Row**.

b. On the Filter toolbar, select **Group AND** or **Group OR**.

c. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.

d. To select a group, click the **Options menu** button for that group, and then click **Select Group**.

e. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.

f. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

g. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Click **Next**.

Organize and lay out your data.

The purpose of this step is to determine which columns to include, the order in which they are displayed, and whether to group data into subcategories. At a minimum, a report just includes columns. By grouping and summarizing the data, you make it easier to see the patterns.

For example, your report could use one level of grouping to group opportunities by salesperson, or add a second level of grouping to show each quarter's opportunities, or add a third level to show the percentage won and lost in each quarter.

To use a chart in your report, if your report has no grouping, you must select at least one numeric column. If your report uses grouping, you must select at least one numeric column with a summary type defined.

Define how to organize the report:

To group items so that they are organized together in the report by date or other common properties:

0. For each grouping level you need, click **Click here to add a grouping**.

1. Define the grouping:

- **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
- **Column**. The name of the Microsoft Dynamics CRM field that contains the data to define the grouping.
- **Time interval**. For datetime fields, group the data by Month, Day, Week, or Year.
- **Sort order**. Sort order for displaying the groups.

- **Column width**. Width of the column heading in pixels.
- **Summary type**. You can group records by a count of matching records.

2. To reorder the grouping levels, use the up and down arrows in the **Common Tasks** section.
3. Click **OK**.

To define the sort order within each group, click **Configure Sorting**, select a column and sort order, and then click **OK**.

To limit reports to groups with the highest or lowest values, click **Set Top or Bottom Number**:

0. Select **Top** or **Bottom**.
1. Select the number of groups to display.
2. Click **OK**.

Define which columns to display in the report. You can display columns that show data from a record, or columns that show summary information:

0. For each column you want to include, click **Click here to add a column**:

- **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
- **Column**. The name of the Microsoft Dynamics CRM field that contains the data to display or summarize.
- **Data type**. The data type of the column, one of: primarykey, nvarchar, picklist, bit, decimal, int, float, money, ntext, datetime, owner, lookup.
- **Name**. The name used in the database.
- **Column width**. The width in pixels of the column.
- **Summary type**. The specific type of summaries available depends on the data type of the column.
  - **None**: lookup, datetime, owner, picklist, bit, ntext
  - **Average**, **Maximum**, **Minimum**, **Percent of Total**, **Sum**: all numeric record types (decimal, int, float, money)
- Use the left and right arrows to reorganize the columns.

1. Click **OK**.

Click **Next**.

Select whether to use a chart in the report.

The purpose of this step is to determine whether to use a chart, and which type of chart to use.

Select whether to include a chart:

- **Table only**. This provides a table grouped and sorted as you specified.
- **Chart and table**. Displays both a chart and table.
  - **Show table below the chart on same page**. Clicking on the chart does nothing.

- **Show chart. To view data for a chart region, click the chart region**. Clicking on an area in the chart will display a table with details for that section of the chart.

Click **Next**.

If the report includes a chart, format the chart.

The purpose of this step is to specify the type of chart, and how the data is displayed in the chart.

Select the chart type, and then click **Next**.
The **Chart preview** area shows how the data will be displayed.

- For vertical and horizontal bar charts and line charts, specify which data to display on each axis:
  - In the **Format Column (X) Axis** section, select the field to use for the X axis, and the label that is displayed on the chart for the field.
  - In the **Format Value (Y) Axis** section, you can select two fields. For each field, you can specify the label that is displayed on the chart.
  - In the **Format Labels and Legends** section, specify whether or not to show the data labels and a legend.
- For pie charts, specify the slices and values for the chart.
  - For slices, you must select one of the groupings in your report.
  - For values, you must select a numeric column with a summary type.

Click **Next**.

Review the summary of the report, click **Next**, and then click **Finish**.

Determine where the report can be run from.

When you finish defining the report, you return to the Report form, where you can update the name and description of the report, and determine where the report is displayed:

- **Categories**

  To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab

  By default, a new report is not put into any category. If you want the report to be included in the category views in the Reports area, such as the **Marketing Reports** view, add a category in the **Categories** box.

- **Related Record Types**
  To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

- **Display In**

  To specify where reports should be visible, click the **Select Values** button , and then select one or more options:

  - **Reports area**
    Report will be displayed in the Reports area.

- **Forms for related record types**
  Report will be displayed on the form for the record type you select in **Related Record Types**
- **Lists for related record types**
  Report will be displayed from specified list view pages.

If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

Tip: If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Test the report, and modify it if needed.

On the Report toolbar, click **Run Report** .
If the report needs modifications, start with step 2 and edit the existing report.

Determine who can use the report. By default, the report is a personal report. This means that you are the only one who can use it.

- To share this report with other users, in the Reports area, select the report, and then on the **More Actions** menu, click **Sharing**.
- To make this report available to everyone in the organization, in the Reports area, select the report, on the Actions toolbar menu, click **Edit Report**, and then on the **Actions** menu, click **Make Report Available to Organization**.

If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Note

All reports generated with the Report Wizard print in landscape mode.

Create and Work with Reports

Run a report

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Find and open a report:

From the Reports area

a. In the **Workplace**, under **My Work**, click **Reports**.

b. To narrow the list, enter the first few letters of the report name, or use the asterisk (*) wildcard in the **Search for records** box and then click the **Find** button . You can also select a view.

c. In the reports list, double-click the report that you want to run.

If the report has a default filter, the default filter will be displayed. Follow step 2 to change the filter.
Tip: To run a report without seeing the default filter, select the report, and then on the Actions toolbar, click **More Actions**, and then click **Run Report**.

From a list of records, including the results of an Advanced Find search

Only reports that relate to the current record type will be available.
You can run some reports on all records in the list, up to ten selected records, or without limiting the records as if you were running the report from the Reports area.

- To run a report on all records on the list:

  a. On the Actions toolbar, click **Reports** .

  b. Under **Run on Selected Records**, click the name of the report.

  c. In the **Select Records** dialog box, click **All records on all pages in the current view**, and then click **Run Report**.

- To run a report on up to ten selected records from the list:

  a. Select the records to include. Select several records by pressing the CTRL key while you click each record.

  b. On the Actions toolbar, click **Reports**.

  c. Under **Run on Selected Records**, click the name of the report.

  d. In the **Select Records** dialog box, click **The selected records**, and then click **Run Report**.

- To run a report without limiting records to items on the list:

  a. On the Actions toolbar, click **Reports**.

  b. If the report is listed under **Run on All Records**, select the report.

  – OR –

  Under **Run on Selected Records**, click the name of the report. In the **Select Records** dialog box, click **All applicable records**, and then click **Run Report**.

  – OR –

  If the report you want to run is not listed, you must go to the Reports area to run the report.

From a record

Only reports that relate to the current record type will be available.

To run a report including data from just one record:

a. With a record open, on the Actions toolbar, click **Reports** .

b. Under **Run on Current Record**, click the name of the report.

From Microsoft Dynamics CRM for Outlook

All reports can be run when you are online.

To run a report while you are offline, you must first create a local data group that includes the report, as well as a local data group that includes any data that should be included in the report.

To create a local data group that contains reports, on the **CRM** menu, click **Modify Local Data Groups**, click **New**, select the the **Report** record type, and then define the criteria for which reports to include. More information: Work with Data to Take Offline

- To run reports from the Reports area, in the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, click **Workplace**, click **My Work**, click **Reports**, and then select a report to run.
- To select a report from a record or list, follow the procedures above. These steps work the same way in Microsoft Dynamics CRM for Outlook.

From a report you saved locally

If you have saved a report on your computer or shared file system that reads dynamic data from Microsoft Dynamics CRM, to open it, browse to the folder that contains your saved report, and double-click the file.

If the report offers filter criteria, if needed, modify the filter criteria and then click **Run Report**.

The list of existing report filtering criteria is grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**.

To edit a parameter in simple mode, click the underlined value and enter a new value.

– OR –

To edit the filter criteria in detailed mode:

. Click **Edit Filter**.

a. To add a criteria row:

1. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
2. Click the query relational operator, and select an operator.
3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.

b. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

0. For each row you want to group, in detailed mode, click the **Options menu** button ▼ for that row, and then click **Select Row**.
1. On the Filter toolbar, select **Group AND** or **Group OR**.
2. To remove a row from a group, click the **Options menu** button ▼ for that row, and then click **Delete**.
3. To select a group, click the **Options menu** button ▼ for that group, and then click **Select Group**.
4. To add a criteria clause to a group, click the **Options menu** button ▼ for that group, click **Add Clause**, and then select the field, query relational operator, and value.
5. To unselect a group that has been previously selected, click the **Options menu** button ▼ for that group, and then click **Deselect Group**.
6. To ungroup a group, click the **Options menu** button ▼ for that group, and then click **Ungroup**.
7. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button ▼ for that group, and then click **Change to OR** or **Change to AND**.

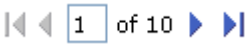
Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button ▼ for that row, and then click **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click the **Options menu** button ▼ for that row, and then click **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click the **Options menu** button ▼ for that row, and then click **Show in Simple Mode**.
- You can set your personal options so that report filters and Advanced Find criteria always open in simple or detailed mode. More information: Set Personal Options

If the report offers parameters, if needed, modify the parameters and then click **View Report**.

Locate data in the report.

- To view or change a record, click the first field in the row for the record. A separate Microsoft Dynamics CRM window will open with the record.
- To view all records associated with a summary or chart report, click **Show All** at the bottom of the report. To navigate back to the original report, click **Original Report** in the report title area.
- To view detailed information about an area in a chart, click an area of the chart. To navigate back to the original report, click **Original Report** in the report title area.

- To page through the report, on the Report toolbar, use the **Page Navigation** buttons  . To locate a specific page, type a page number in the box and then press **Enter**.
- To quickly locate specific information in your report, in **Find | Next**, type a few characters, and then click **Find**.
- To sort a column, click the column title. The direction of sorting is indicated by the **Ascending sort** button or the **Descending sort** button .
- To view or hide the filter summary, expand or collapse **Filter Summary**.
- To update your report, click the **Refresh** button .
- To hide the report parameters, click the **Hide Parameters** button . To display the report parameters, click the **Show Parameters** button .

Print the report. On the Report toolbar, click the **Print** button .
If you are working offline using Microsoft Dynamics CRM for Outlook, on the Report toolbar, select **Web archive** format, click **Export**, and then on the **File** menu, click **Print**.

Tips

- If a chart doesn't display the first time you export a report to **Web archive** format, export the report a second time.
- To print reports, you need a Reporting Services Microsoft ActiveX control. The first time you print a Reporting Services report from either Microsoft Dynamics CRM or Microsoft Dynamics CRM for Microsoft Office Outlook, you will see a prompt **Do you want to install this software?**.

  To install the required control, click **Install**.

Export the report.

Important The exported report is temporary. If you need to save the exported report to a local file, use the viewing program to save the file to disk. The saved exported report is no longer connected to Microsoft Dynamics CRM. Therefore, it does not change if Microsoft Dynamics CRM data changes.

. In the **Export** box, select a format, and then click **Export**.
A second browser window is used to display the report, using a viewer associated with the export format you selected.
The formats that are available are determined by the rendering extensions that are installed on the Microsoft SQL Server Reporting Services report server, and also by whether you are online or offline.

- If you are working offline, only the **Excel** and **Acrobat (PDF) file** formats are available.
- If you are using Microsoft SQL 2005 Workgroup edition, the **XML file with report data** format is not available.

If a viewer is not available for the format you select, you must select a different format or install the viewer.
The following export formats are included in a default installation when you are online. The list of export formats available to you may vary from those listed here.

- **Excel**
  View the report in Microsoft Office Excel. This format includes all the row, column, and field labels, in addition to report formatting.
  Large reports and reports with charts might not display with the expected formatting when exported in this file format. To export only the data, instead of using this format, from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, export the data into Microsoft Office Excel, and then save as a comma-delimited (CSV) file. More information: Export Data to Excel
- **Web archive**
  View the report in Microsoft Internet Explorer, as a MIME-encoded HTML format that keeps images and linked content together with a report. For chart reports, if the chart is not displayed correctly the first time that you export the report, export the report again.
  Choose this format to view a report offline or for e-mailing the report.
- **Acrobat (PDF) file**
  View the report using a client-side PDF viewer. You must have Adobe Acrobat Reader to use this format.
  Choose this format for long reports, paginated reports, or reports that are delivered as a file.
- **TIFF file**
  View the report in the default TIFF viewer. For some Windows clients, this is the Windows Pictures and Fax Viewer.
  Choose this format to a view a report in a page-oriented layout. The TIFF format is the recommended format for printing reports.
- **CSV (comma delimited)**
  View the report as a text file, with fields separated by commas. This format includes all the row, column, and field labels.
  To export only the data, instead of using this format, export data from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, into Microsoft Office Excel, and then save as a comma-delimited (CSV) file.
- **XML file with report data**
  View the report as an XML file.

Tips

- If there is no report that gives you the information you need, you can either export data to Microsoft Office Excel, or create your own report. More information: Export Data to Excel, Create and Work with Reports
- If a snapshot of a Reporting Services report exists, you can view it from the Reports area. To see if any snapshots exist for a report, click the **View Snapshots** button next to the report. If a snapshot exists, click the snapshot link to view the snapshot.

Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: Set Personal Options

Add a report without using the Report Wizard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. To add a new report, click **New**.

Add a new file that reads data from the Microsoft Dynamics CRM database.

You can add a static file, or a dynamic Microsoft Office, Microsoft SQL Server Reporting Services or other ODBC-compliant file that reads data from the Microsoft Dynamics CRM database.

1. In the **Source** section, in the **Report Type** box, select **Existing File**.
2. In the **File Location** box, enter the path and file name of the dynamic or static file to add, or click **Browse** to locate the file.

   When you add a new Reporting Services report, if the report is enabled for pre-filtering and the report doesn't already have a default filter, a default filter that limits the data in the report to records modified within the past 30 days that have status set to active is added.

   For information about creating Microsoft Office files or other ODBC-compliant files that read directly from the Microsoft Dynamics CRM database, see: Write a Report Using Report-Writing Tools.

Tips

- To change a file that has been added as a report, you must download it, make any changes, and then add it again.
- By default, the maximum size of the file that you can upload is 4 megabytes (MB). This can be changed by your system administrator. More information: Microsoft Knowledge Base Article 295626

Add a new link to a Web page

1. In the **Source** section, in **Report Type**, select **Link to Web page**.
2. In the **Web Page URL** box, enter the URL of the Web page to add.

Specify the properties for the report.

- **Name**

  The name for the report that is shown in the Reports area and on the **Reports** menu in forms and lists.

- **Description**

  The description that is displayed in the Reports area.

- **Parent Report**
  If this report is a sub-report or a drill-through report, specify an existing parent report. If this is not specified, the parent report will display a "Report not found" error.
- **Categories**
  To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab
- **Related Record Types**
  To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.
- **Display In**
  To specify where reports should be visible, click the **Select Values** button , and then select one or more options:
  - **Reports area**
    Report will be displayed in the Reports area.
  - **Forms for related record types**
    Report will be displayed on the form for the record type you select in **Related Record Types**

    If the report is enabled for pre-filtering, from the record, users can specify running the report on the current record.
  - **Lists for related record types**
    Report will be displayed from specifie
    d list view pages.

    If the report has pre-filtering enabled, from the list view, users can specify running the report on selected records.
- If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.
- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

Click **Save** or **Save and Close**.

The report is added as a personal report.

Tips

- To share this report with other users, in the Reports area, select the report, and then on the **More Actions** menu, click **Sharing**.
- To make this report available to everyone in the organization, in the Reports area, select the report, on the Actions toolbar menu, click **Edit Report**, and then on the **Actions** menu, click **Make Report Available to Organization**.

- If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Edit report properties

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report, and on the Actions toolbar, click **Edit Report** .
3. Specify the properties for the report:
   - **Source**
     This section specifies the source file for the report. If you are just changing properties for the report, do not change the information in this section.
   - **Name**
     The name for the report that is shown in the Reports area and on the **Reports** menu in forms and lists.
   - **Description**
     The description that is displayed in the Reports area.
   - **Parent Report**
     If this report is a sub-report or a drill-through report, specify an existing parent report. If this is not specified, the parent report will display a "Report not found" error.
   - **Categories**
     To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab
   - **Related Record Types**
     To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
     For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.
   - **Display In**
     To specify where reports should be visible, click the **Select Values** button , and then select one or more options:
     - **Reports area**
       Report will be displayed in the Reports area.
     - **Forms for related record types**
       Report will be displayed on the form for the record type you select in **Related Record Types**

       If the report is enabled for pre-filtering, from the record, users can specify running the report on the current record.

- **Lists for related record types**
  Report will be displayed from specified list view pages.

  If the report has pre-filtering enabled, from the list view, users can specify running the report on selected records.

- If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.
- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

4. Click **Save** or **Save and Close**.

Tips

- To see all reports, including sub-reports that are not visible in the default view, select the **All Reports, Including Sub-Reports** view.
- If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: Set Personal Options

Create a new report from an existing report

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

To copy a Report Wizard report and modify it using Report Wizard, see Create, Edit, or Copy a Report Using the Report Wizard.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select a report.
   To see all reports, including sub-reports that are not visible in the default view, select the **All Reports, Including Sub-Reports** view.
3. On the Actions toolbar, click **Edit Report** , and then on the **Actions** menu, click **Download Report**.
4. Click **Save**, and specify the location in which to save the file. If you are creating a new report rather than modifying a report, rename the file.

   Whenever a Microsoft SQL Server Reporting Services report is downloaded, the datasource for the report is changed to Adventure_Works_Cycle_MSCRM. This is done for security reasons: you can

share the.RDL file with the report without worrying about revealing your database name. You will need to change the datasource name back to the name of your Microsoft Dynamics CRM database prior to uploading changes to the file.

5. In the **Download Complete** dialog box, click **Close**.
6. To copy a report and add it to Microsoft Dynamics CRM:
   a. Follow the previous steps to download the file.
   b. Copy the downloaded file and rename the copy.
   c. For Reporting Services reports, change the datasource name in the report to the name of your Microsoft Dynamics CRM database.
   d. Make any changes required to the new report. For Reporting Services reports, use Reporting Services Report Designer. You will need a report development environment:

▸ How to set up a report development environment

Install the required components on your computer:

- Microsoft Visual Studio, or any product that uses the Visual Studio.NET integrated development environment (such as Microsoft Visual Basic.NET).
- Reporting Services Report Designer
  Reporting Services Report Designer 2005 can be installed from the Microsoft SQL Server 2005 CD, and requires Visual Studio.NET 2005.
- Make sure a security role assigned to your account includes the Publish Reports and Add Reporting Services Reports privileges.

In addition to the required components, the following documentation is helpful:

- *Report Writers Guide* section of the *Microsoft CRM 4.0 Software Development Kit*. More information: Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)
- *Reporting Services Books Online* provides help for Reporting Services. More information: SQL Server 2005 Reporting Services Books Online

   e. Add the new report back to Microsoft Dynamics CRM.

▸ **Tip**

If you don't want users to run the base report you started from:

1. In the Reports area, select the report.
2. On the Actions toolbar, click **Edit Report** .
3. On the **Actions** menu, click **Revert to Personal Report**.

Note

When you download a drill-through report created with the Report Wizard, and edit the downloaded report in Reporting Services Report Designer, there are manual changes required. More information: Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)

Edit the default filter for a report

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

If a report is a Microsoft SQL Server Reporting Services report, is enabled for pre-filtering, and has a default filter, you can change the default filter that will be used each time any user runs the report.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select a report.
   To see all reports, including sub-reports that are not visible in the default view, select the **All Reports, Including Sub-Reports** view.
3. On the Actions toolbar, click **More Actions**, and then click **Edit Default Filter**.
4. Modify the filter criteria.

   The criteria are grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**.

   - To edit an existing row, click the query relational operator and select an operator, or click the underlined value and enter a new value.
   - Click the query relational operator, and select an operator.
   - To add a criteria row:
     a. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
     b. Click the query relational operator, and select an operator.
     c. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
   - To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.
     a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.
     b. On the Filter toolbar, select **Group AND** or **Group OR**.
     c. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
     d. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
     e. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
     f. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

g. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button for that row, and then click **Delete**.

5. Click **Save Default Filter**.
6. Click **Save** or **Save and Close**.

Edit a default report or create a Reporting Services report

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

The default reports in Microsoft Dynamics CRM are all Reporting Services reports. Default reports cannot be edited with the Report Wizard. To edit the default reports or create a new Reporting Services report other than one created by using the Report Wizard, you need a report development environment:

How to set up a report development environment

Install the required components on your computer:

- Microsoft Visual Studio, or any product that uses the Visual Studio.NET integrated development environment (such as Microsoft Visual Basic.NET).
- Reporting Services Report Designer
  Reporting Services Report Designer 2005 can be installed from the Microsoft SQL Server 2005 CD, and requires Visual Studio.NET 2005.
- Make sure a security role assigned to your account includes the Publish Reports and Add Reporting Services Reports privileges.

In addition to the required components, the following documentation is helpful:

- *Report Writers Guide* section of the *Microsoft CRM 4.0 Software Development Kit*. More information: Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)
- *Reporting Services Books Online* provides help for Reporting Services. More information: SQL Server 2005 Reporting Services Books Online

1. Identify the existing report that is closest in design to your new report.

2. Download the report from Microsoft Dynamics CRM to a computer that is set up with the report development environment.

    a. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.

    b. On the Actions toolbar, click **Edit Report** , and then on the **Actions** menu, click **Download Report**.

    c. Click **Save**, and specify the location in which to save the file. If you are creating a new report rather than modifying a report, rename the file.

    d. In the **Download Complete** dialog box, click **Close**.

3. In a product using the Visual Studio integrated development environment (IDE), open the report, and make the required changes.
   If you are making major changes, first read Writing Reporting Services Reports (Microsoft Dynamics CRM SDK).

4. Add the report to Microsoft Dynamics CRM.

    a. In the Microsoft Dynamics CRM Reports area, click **New**.

    b. In the **Report Type** box, select **Existing File**.

    c. In the **File Location** box, enter the path and file name of the dynamic or static file to add, or click **Browse** to locate the file.

    d. Edit the report properties:

    - **Name**

      The name for the report that is shown in the Reports area and on the **Reports** menu in forms and lists.

    - **Description**
      The description that is displayed in the Reports area.

    - **Parent Report**
      If this report is a sub-report or a drill-through report, specify an existing parent report. If this is not specified, the parent report will display a "Report not found" error.

    - **Categories**
      To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab

    - **Related Record Types**
      To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
      For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

    - **Display In**

      To specify where reports should be visible, click the **Select Values** button , and then select one or more options:

        - **Reports area**
          Report will be displayed in the Reports area.

        - **Forms for related record types**
          Report will be displayed on the form for the record type you select in **Related Record Types**

If the report is enabled for pre-filtering, from the record, users can specify running the report on the current record.

- **Lists for related record types**
  Report will be displayed from specified list view pages.

  If the report has pre-filtering enabled, from the list view, users can specify running the report on selected records.

- If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.
- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

e. Click **Save**.

f. To modify the filter for the report, on the Actions toolbar, click **More Actions**, and then click **Edit Default Filter**.

Tips

- To share your new file with other users, do one of the following:
  - Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
  - If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
  - Put the report in a shared file system.
  - E-mail the report to other Microsoft Dynamics CRM users in the same domain.
- If you don't want users to run the base report you started from:
  1. In the Reports area, select the report.
  2. On the Actions toolbar, click **Edit Report** .
  3. On the **Actions** menu, click **Revert to Personal Report**.

Create one-time or scheduled Reporting Services report snapshots

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

To create a snapshot of a Reporting Services report, you create a snapshot definition, which can be used to create on-demand snapshots or to schedule snapshots to occur at specific times. Each snapshot definition can create and store up to eight snapshots. When the ninth snapshot is created, the first snapshot is automatically deleted.

Caution: When you make a snapshot available to other users, all the data in the snapshot is visible, whether or not the other users have permission to view this data directly in Microsoft Dynamics CRM. Make sure you don't share information that other users do not have permission to view.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select a report.
3. On the **More Actions** menu, click **Schedule Report** and complete the steps in the wizard.

Tips

- After you create a snapshot definition, rename the snapshot definition so that users can easily understand the purpose of the snapshot.
    1.
    2. In the **Name** box, enter a new name, and then click **Save and Close**.
- After you have created snapshots, if you don't want users to be able to run the base report:
    1. In the Reports area, select the report.
    2. On the Actions toolbar, click **Edit Report** .
    3. On the **Actions** menu, click **Revert to Personal Report**.

Make a report available to all Microsoft Dynamics CRM users

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report you created, and on the Actions toolbar, click **Edit Report**.
3. On the **Actions** menu, click **Make Report Available to Organization**.

Note

To revert a report back to a personal report, on the **Actions** menu, click **Revert to Personal Report**.

Create, edit, or copy a report using the Report Wizard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

How to determine which record types have the data you need

There is one record type for each type of data, such as accounts, contacts, or services.

In addition, there are separate record types for:

- Notes. Every note and attachment is stored as a separate record in the Notes record type.
- Close activities. Whenever you close an opportunity, quote or order, an activity is created that tracks the reason for closing the record. These are stored respectively in the Opportunity Close Activity, Quote Close Activity, and Order Close Activity record types. When you close a case, the data is stored in the Case Resolution Activity.

If your report includes data from communication activities, you have two options:

- If you want data about multiple types of communication activities in one report such as the activity subjects and due dates for all types of activities, use the Activity record type.
- If you need specific information about a specific type of activity, such as the recipients, use the Task, E-mail Message, Fax, Appointment, Letter, or Phone Call record type.

Tip:

- While you are creating your report, keep a window open showing a record from the data type you are including in your report. It will help you determine which columns to include.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. To add a new report, click **New**, and then click **Report Wizard**.

   – OR –

   To edit an existing Report Wizard report, select the report, on the Actions toolbar, click **Edit Report** , and then click **Report Wizard**.
   You can only use the Report Wizard to edit reports that were created with the wizard.

3. Select a starting point for your report.
   a. To create a new report, select **Start a new report**.

      – OR –

      To start from a copy of an existing report, select **Start from an existing report**, select the report, and also clear the **Overwrite existing report** check box.

      – OR –

To edit an existing report, select **Start from an existing report**, select the report, and check the **Overwrite existing report** check box.

b. If multiple languages are installed, select the language to use for column names, record types, and wizard-generated text in the report.

c. Click **Next**.

4. Enter the name of the report, and specify which record types the report will use.

The purpose of this step is to identify where the data in the report comes from. You can include data from one or two record types, plus data from related records.

a. Enter data in each field:

- **Report name**. This value will be displayed on the **Reports** menu and in the Reports area.
- **Primary record type**. Data from all fields in this record type and related record types will be available when you are defining criteria for which records to include. Data from this record type will be available when you are selecting fields to display.
- **Related record type**. If you need to display data from a related record type, select an additional record type here.

  Tip: If you don't need data from a related record type, don't select one, as it makes the report take longer to load.

b. Click **Next**.

5. Specify which records to include.

The purpose of this step is to determine which records are included in your report. This information is saved as the default filter for the report.

You can select criteria based on the selected record types or on columns from related records.

a. To include only records defined by an existing system view or saved view, select a view.

– OR –

To define which records to include by selecting criteria:

- To add a criteria row:
  1. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
  2. Click the query relational operator, and select an operator.
  3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
- To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

a. For each row you want to group, click the **Select Row** button for that row, and then click **Select Row**.

b. On the Filter toolbar, select **Group AND** or **Group OR**.

c. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.

d. To select a group, click the **Options menu** button for that group, and then click **Select Group**.

e. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.

f. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

g. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Click **Next**.

Organize and lay out your data.

The purpose of this step is to determine which columns to include, the order in which they are displayed, and whether to group data into subcategories. At a minimum, a report just includes columns. By grouping and summarizing the data, you make it easier to see the patterns.

For example, your report could use one level of grouping to group opportunities by salesperson, or add a second level of grouping to show each quarter's opportunities, or add a third level to show the percentage won and lost in each quarter.

To use a chart in your report, if your report has no grouping, you must select at least one numeric column. If your report uses grouping, you must select at least one numeric column with a summary type defined.

Define how to organize the report:

To group items so that they are organized together in the report by date or other common properties:

0. For each grouping level you need, click **Click here to add a grouping**.
1. Define the grouping:

- **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
- **Column**. The name of the Microsoft Dynamics CRM field that contains the data to define the grouping.
- **Time interval**. For datetime fields, group the data by Month, Day, Week, or Year.
- **Sort order**. Sort order for displaying the groups.
- **Column width**. Width of the column heading in pixels.

- **Summary type**. You can group records by a count of matching records.

2. To reorder the grouping levels, use the up and down arrows in the **Common Tasks** section.
3. Click **OK**.

To define the sort order within each group, click **Configure Sorting**, select a column and sort order, and then click **OK**.

To limit reports to groups with the highest or lowest values, click **Set Top or Bottom Number**:

0. Select **Top** or **Bottom**.
1. Select the number of groups to display.
2. Click **OK**.

Define which columns to display in the report. You can display columns that show data from a record, or columns that show summary information:

0. For each column you want to include, click **Click here to add a column**:
    - **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
    - **Column**. The name of the Microsoft Dynamics CRM field that contains the data to display or summarize.
    - **Data type**. The data type of the column, one of: primarykey, nvarchar, picklist, bit, decimal, int, float, money, ntext, datetime, owner, lookup.
    - **Name**. The name used in the database.
    - **Column width**. The width in pixels of the column.
    - **Summary type**. The specific type of summaries available depends on the data type of the column.
        - **None**: lookup, datetime, owner, picklist, bit, ntext
        - **Average**, **Maximum**, **Minimum**, **Percent of Total**, **Sum**: all numeric record types (decimal, int, float, money)
    - Use the left and right arrows to reorganize the columns.
1. Click **OK**.

Click **Next**.

Select whether to use a chart in the report.

The purpose of this step is to determine whether to use a chart, and which type of chart to use.

Select whether to include a chart:

- **Table only**. This provides a table grouped and sorted as you specified.
- **Chart and table**. Displays both a chart and table.
    - **Show table below the chart on same page**. Clicking on the chart does nothing.

- **Show chart. To view data for a chart region, click the chart region**. Clicking on an area in the chart will display a table with details for that section of the chart.

Click **Next**.

If the report includes a chart, format the chart.

The purpose of this step is to specify the type of chart, and how the data is displayed in the chart.

Select the chart type, and then click **Next**.
The **Chart preview** area shows how the data will be displayed.

- For vertical and horizontal bar charts and line charts, specify which data to display on each axis:
  - In the **Format Column (X) Axis** section, select the field to use for the X axis, and the label that is displayed on the chart for the field.
  - In the **Format Value (Y) Axis** section, you can select two fields. For each field, you can specify the label that is displayed on the chart.
  - In the **Format Labels and Legends** section, specify whether or not to show the data labels and a legend.
- For pie charts, specify the slices and values for the chart.
  - For slices, you must select one of the groupings in your report.
  - For values, you must select a numeric column with a summary type.

Click **Next**.

Review the summary of the report, click **Next**, and then click **Finish**.

Determine where the report can be run from.

When you finish defining the report, you return to the Report form, where you can update the name and description of the report, and determine where the report is displayed:

- **Categories**

  To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab

  By default, a new report is not put into any category. If you want the report to be included in the category views in the Reports area, such as the **Marketing Reports** view, add a category in the **Categories** box.

- **Related Record Types**
  To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

- **Display In**

  To specify where reports should be visible, click the **Select Values** button , and then select one or more options:

  - **Reports area**
    Report will be displayed in the Reports area.

- **Forms for related record types**
  Report will be displayed on the form for the record type you select in **Related Record Types**
- **Lists for related record types**
  Report will be displayed from specified list view pages.

If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

Tip: If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Test the report, and modify it if needed.

On the Report toolbar, click **Run Report** .
If the report needs modifications, start with step 2 and edit the existing report.

Determine who can use the report. By default, the report is a personal report. This means that you are the only one who can use it.

- To share this report with other users, in the Reports area, select the report, and then on the **More Actions** menu, click **Sharing**.
- To make this report available to everyone in the organization, in the Reports area, select the report, on the Actions toolbar menu, click **Edit Report**, and then on the **Actions** menu, click **Make Report Available to Organization**.

If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Note

All reports generated with the Report Wizard print in landscape mode.

Make a report available for external use

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

Publishing a report for external use makes it available for use in a Microsoft SharePoint Web part or in a custom program, and enables you to work with the report using Microsoft SQL Server Reporting Services.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report, and on the Actions toolbar, click **Edit Report** .
3. On the **Actions** menu, click **Publish Report For External Use**.

Write a Report Using Report-Writing Tools

You can use any ODBC-compliant application to read data directly from the Microsoft Dynamics CRM database. When possible, using built-in reporting tools is easier than using the steps in this procedure. Recommended alternatives:

- Export Data to Excel
- Create Customer-Ready Documents and Messages
- Create, Edit, or Copy a Report Using the Report Wizard

Edit a default report or create a Reporting Services report

▸ Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

The default reports in Microsoft Dynamics CRM are all Reporting Services reports. Default reports cannot be edited with the Report Wizard. To edit the default reports or create a new Reporting Services report other than one created by using the Report Wizard, you need a report development environment:

▸ How to set up a report development environment

Install the required components on your computer:

- Microsoft Visual Studio, or any product that uses the Visual Studio.NET integrated development environment (such as Microsoft Visual Basic.NET).
- Reporting Services Report Designer
  Reporting Services Report Designer 2005 can be installed from the Microsoft SQL Server 2005 CD, and requires Visual Studio.NET 2005.
- Make sure a security role assigned to your account includes the Publish Reports and Add Reporting Services Reports privileges.

In addition to the required components, the following documentation is helpful:

- *Report Writers Guide* section of the *Microsoft CRM 4.0 Software Development Kit*. More information: Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)
- *Reporting Services Books Online* provides help for Reporting Services. More information: SQL Server 2005 Reporting Services Books Online

1. Identify the existing report that is closest in design to your new report.
2. Download the report from Microsoft Dynamics CRM to a computer that is set up with the report development environment.
   a. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
   b. On the Actions toolbar, click **Edit Report** , and then on the **Actions** menu, click **Download Report**.
   c. Click **Save**, and specify the location in which to save the file. If you are creating a new report rather than modifying a report, rename the file.
   d. In the **Download Complete** dialog box, click **Close**.
3. In a product using the Visual Studio integrated development environment (IDE), open the report, and make the required changes.
   If you are making major changes, first read Writing Reporting Services Reports (Microsoft Dynamics CRM SDK).
4. Add the report to Microsoft Dynamics CRM.

a. In the Microsoft Dynamics CRM Reports area, click **New**.

b. In the **Report Type** box, select **Existing File**.

c. In the **File Location** box, enter the path and file name of the dynamic or static file to add, or click **Browse** to locate the file.

d. Edit the report properties:

- **Name**

  The name for the report that is shown in the Reports area and on the **Reports** menu in forms and lists.

- **Description**

  The description that is displayed in the Reports area.

- **Parent Report**

  If this report is a sub-report or a drill-through report, specify an existing parent report. If this is not specified, the parent report will display a "Report not found" error.

- **Categories**

  To specify the categories in which to include this report, click the **Select Values** button, and then select the categories. More information: System Settings Dialog Box - Reporting Tab

- **Related Record Types**

  To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button, and then select record types.
  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

- **Display In**

  To specify where reports should be visible, click the **Select Values** button, and then select one or more options:

  - **Reports area**

    Report will be displayed in the Reports area.

  - **Forms for related record types**

    Report will be displayed on the form for the record type you select in **Related Record Types**

    If the report is enabled for pre-filtering, from the record, users can specify running the report on the current record.

  - **Lists for related record types**

    Report will be displayed from specified list view pages.

    If the report has pre-filtering enabled, from the list view, users can specify running the report on selected records.

- If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**

  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that

language in their personal options. To make this report available to all users, select **All Languages**.
Note that this does not change the language used inside the report.

e. Click **Save**.

f. To modify the filter for the report, on the Actions toolbar, click **More Actions**, and then click **Edit Default Filter**.

Tips

- To share your new file with other users, do one of the following:
  - Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
  - If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
  - Put the report in a shared file system.
  - E-mail the report to other Microsoft Dynamics CRM users in the same domain.
- If you don't want users to run the base report you started from:
  1. In the Reports area, select the report.
  2. On the Actions toolbar, click **Edit Report** .
  3. On the **Actions** menu, click **Revert to Personal Report**.

Use Microsoft Office Word 2003

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

There are several ways you can merge Microsoft Dynamics CRM data into Microsoft Office Word 2003. If you use Microsoft Office Word 2007, you can also use mail merge from Microsoft Dynamics CRM and from Microsoft Dynamics CRM for Outlook.

- Export a list, such as the results of an Advanced Find search, into a dynamic or static Microsoft Office Excel file, and use the Excel file as the data source for a Microsoft Office Word 2003 mail merge. This does not create a Microsoft Dynamics CRM activity for each merged record. More information: Export Data to Excel
- From Microsoft Office Word 2003, read data directly from the Microsoft Dynamics CRM database. This does not create a Microsoft Dynamics CRM activity for each merged record. This method is described in this topic.

1. In Microsoft Office Word, on the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge**.
   Follow the instructions in steps 1 and 2 of the **Mail Merge** pane.
2. In step 3 of the **Mail Merge** instructions, select **Use an existing list**, and then click **Browse**.
3. Click **New SQL Server connection.odc**, and then click **Open**.
4. In the **Server Name** box, type the name of the server where the Microsoft Dynamics CRM database is stored, and then click **Next**.
5. In the database list, select the *Organization*_**MSCRM** database.
6. In the **Name** column, select a filtered view that starts with the prefix **Filtered**.
7. Click **Next**, and then click **Finish**.
8. Complete the mail merge by following the remaining steps in the Microsoft Office Word **Mail Merge** pane.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
  1. In the Microsoft Dynamics CRM Reports area, select the report.
  2. Click **Edit Report** .
  3. On the **Actions** menu, click **Make Report Available to Organization**.
- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Use Microsoft Office Word 2007

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

There are several ways you can merge Microsoft Dynamics CRM data into Microsoft Office Word 2007.

- From a list of records such as the results of an Advanced Find search, use mail merge to merge the data into Word 2007. You can create letters or e-mail activities for each record in the list. More information: Create Customer-Ready Documents and Messages
- From Microsoft Dynamics CRM for Outlook, mail merge data from a list. You can create letters or e-mail activities for each record in the list. More information: Create Customer-Ready Documents and Messages
- Export a list, such as the results of an Advanced Find search, into a dynamic or static Microsoft Office Excel file, and use the Excel file as the data source for a Microsoft Office Word 2007 mail merge. This does not create a Microsoft Dynamics CRM activity for each merged record. More information: Export Data to Excel
- From Word, read data directly from the Microsoft Dynamics CRM database. This does not create a Microsoft Dynamics CRM activity for each merged record. This method is described in this topic.

1. In Word 2007, on the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.
2. Click **Step by Step Mail Merge Wizard**.
3. Follow the instructions in steps 1 and 2 of the **Mail Merge** pane.
4. In step 3 of the **Mail Merge** instructions, select **Use an existing list**, and then click **Browse**.
5. Click **New SQL Server Connection.odc**, and then click **Open**.
6. In the **Server name** box, type the name of the server where the Microsoft Dynamics CRM database is stored, and then click **Next**.
7. In the database list, select the *Organization*_**MSCRM** database.
8. In the **Name** column, select a filtered view that starts with the prefix **Filtered**.
9. Click **Next**, and then click **Finish**.
10. Complete the mail merge by following the remaining steps in the Microsoft Office Word **Mail Merge** pane.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
  1. In the Microsoft Dynamics CRM Reports area, select the report.
  2. Click **Edit Report** .

3. On the **Actions** menu, click **Make Report Available to Organization**.

- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Use Microsoft Office Excel 2003

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. To create a PivotTable, in Excel 2003, on the **Data** menu, click **PivotTable and PivotChart Report**.

   – OR –

   To create a worksheet, in Excel 2003, on the **Data** menu, click **Import External Data**, and then click **New Database Query**.

2. Create a new data source for the Microsoft Dynamics CRM database, or if you already have a data source set up that connects to the Microsoft Dynamics CRM database, connect to it.

   - To create a new data source:
     a. If you are creating a data source for a PivotTable, in the **PivotTable and PivotChart Wizard - Step 1 of 3** dialog box, select **External Data Source**, click **Next**, and then click **Get Data**.
     b. In the **Choose Data Source** dialog box, select **<New Data Source>**, and then click **OK**.
     c. In the **Create New Data Source** dialog box, type a name for the data source, and then in the driver list, select **SQL Server**.
     d. Click **Connect**.
     e. In the **SQL Server Login** dialog box, in the **Server** list, select the Microsoft SQL Server or server instance where the Microsoft Dynamics CRM database is installed, and then click **Options**.
     f. In the **Database** box, select *Organization*_**MSCRM**, and then click **OK** three times. The **Query Wizard** dialog box opens.
   - To connect to an existing data source that uses the Microsoft Dynamics CRM database:
     a. If you are creating a data source for a PivotTable, in the **PivotTable and PivotChart Wizard - Step 1 of 3** dialog box, select **External Data Source**, click **Next**, and then click **Get Data**.
     b. Select an existing data source that uses the Microsoft Dynamics CRM database, and then click **OK**.

3. In the **Query Wizard Available tables and columns list** dialog box, select filtered views that start with the prefix **Filtered**. You can select columns within each filtered view, and select multiple filtered views.

   Caution To integrate with built-in security, only include filtered views in your query. If you connect directly to a database table, the spreadsheet may fail to return data for other users.

4. Continue with the Query Wizard. For more information about the Query Wizard, click the **Help** button to open Microsoft Query Help. For more information about importing external data to Excel, search for "import external data" in Excel Help.
5. For PivotTables, in the **PivotTable and PivotChart Wizard - Step 2 of 3** dialog box, click **Next**, and then click **Finish**. Then drag the fields as needed to your PivotTable.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Use Microsoft Office Excel 2007

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. In Excel 2007, on the **Data** tab, in the **Get External Data** group, click **From Other Sources**, and then click **From Microsoft Query**.
2. In the **Choose Data Source** dialog box, select **<New Data Source>**, and then click **OK**.
3. In the **Create New Data Source** dialog box, type a name for the data source, and then in the driver list, select **SQL Server**.
4. Click **Connect**.
5. In the **SQL Server Login** dialog box, in the **Server** list, select the Microsoft SQL Server or server instance where the Microsoft Dynamics CRM database is installed, and then click **Options**.
6. In the **Database** box, select *Organization*_**MSCRM**, and then click **OK** three times.
   The **Query Wizard - Choose Columns** dialog box opens.
7. In the **Query Wizard - Choose Columns** dialog box, select filtered views that start with the prefix **Filtered**. You can select columns within each filtered view, and select multiple filtered views.

   Caution To integrate with built-in security, only include filtered views in your query. If you connect directly to a database table, the spreadsheet may fail to return data for other users.

8. Continue with the Query Wizard. For more information about the Query Wizard, click the **Help** button to open Microsoft Query Help. For more information about importing external data to Excel, search for "import external data" in Excel Help.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Use another report-writing tool

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Read the online Help for the application that you are using to determine how to read external data from a Microsoft SQL Server database.
2. When selecting the data source, choose the SQL Server instance used by Microsoft Dynamics CRM and the *Organization*_**MSCRM** database.
3. Select filtered views that start with the prefix **Filtered** and any fields from the filtered views that you want in your report.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Communicating with Customers

Managing Communication Activities

You can create fully documented correspondence with your customers by creating activity records. You can organize and track activities:

- Organize activities by the completion date, so that you know what you've performed and when.
- Organize activities by type, priority, date due, or the reason for the activity.
- Organize activities by status.
- Review a list of activities that have been performed for a particular customer.
- Associate an activity with an account, contact, lead, or opportunity.
- Create mail merge documents.

Note

You cannot set reminders for faxes, phone calls, letters, or campaign responses. Whether you can set reminders for tasks, e-mail messages, appointments, and service activities depends on whether you created the activities in Microsoft Dynamics CRM for Microsoft Office Outlook or in the Web application. More information: Manage Activities

Create Customer-Ready Documents and Messages

There are two main methods of creating customer-ready documents: mail merge and direct e-mail. With mail merge, you can use Microsoft Office Word and Microsoft Office Word templates to create letters, faxes, envelopes, and e-mail messages. With direct e-mail, you can send a mass mailing of the same message using Microsoft Dynamics CRM e-mail templates to multiple e-mail recipients. This is also known as sending bulk e-mail.

Send direct e-mail

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

Direct e-mail uses Microsoft Dynamics CRM e-mail templates. If you want to use Microsoft Office Word templates, use the mail merge feature.

You cannot attach or insert files, including image files, into an e-mail message template or an e-mail message created with an e-mail template, such as a direct e-mail or a quick campaign.

1. In the Navigation Pane, under **Sales** or **Marketing**, click the record type you want, for example, **Contacts**.
   Which panes you see will depend on the security roles you have been assigned.

   You can also send direct e-mail to users from the **Users** list.

2. In the **View** list, select the filtered view you want.
3. If you want to send direct e-mail to only a few people, select the records you want.

   – OR –

   If you want to send direct e-mail to everyone displayed in the current list, go to the next step.

4. On the Actions toolbar, click **Send Direct E-mail** .
5. In the **Send Direct E-mail** dialog box, select the template you want to use.
   To view a description of the template, select the template.
6. To specify the recipients of the direct e-mail, select:
   - **Selected records on current page** to send the e-mail to only the contacts you selected.
   - **All records on current page** to send the e-mail to all the contacts on the current page of the current view.
   - **All records on all pages** to send the e-mail to all the contacts on all the pages of the current view.
7. Click **Send**.
   An e-mail activity is created for each recipient.

Note

If an account or contact does not have a valid e-mail address or has the **Do Not Allow** option set for **Bulk E-mail**, the message is not sent to them, and no e-mail activity is created.

Tips

- You can also select recipients from a search in Advanced Find. When you use **Advanced Find**, you can reduce the number of message failures that are due to customers for whom you do not have e-mail addresses. In a new or saved search, click **Select**, and select **E-mail**. Click **Equals** and select **Contains Data**. Enter any other search criteria and then click **OK**.
- You can change the sender's contact information. To change contact information, in the **User or Queues** box, click the **Lookup** button to search for a record.

Create a Microsoft Office Word mail merge document

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

In Microsoft Dynamics CRM for Outlook, only one mail merge can be run at a time. If you want to discontinue a mail merge, close Microsoft Office Word. You can run multiple mail merge processes at the same time in the Web application.

Record types that use mail merge

- Account
- Campaign
  To use mail merge with a campaign, you must first distribute a mail campaign activity to a selected marketing list.
- Contact
- Lead
- Opportunity
- List Member in Marketing List
- Quick Campaign
  In Microsoft Dynamics CRM for Outlook, you can create a mail merge, and then at the end of the process, create a quick campaign.
- Quote
  With mail merge, you can print only one quote at a time.

1. Open the list of records you want.
2. In the list, select one or more records to add to the mail-merge recipient list.
3. On the Actions toolbar, click **Mail Merge** .
4. If you have other languages installed, you can select a language to filter the list of templates.
5. In the **Mail Merge** dialog box, select the type of document you want to use.

Note

If the **E-mail** option is not available, the **Enable Direct E-mail via Mail Merge** option in the **System Settings** may be set to **No**. More information: Manage System Settings

6. Select if you want to start with a blank document or a template. If you select a template option, click the **Lookup** button to select a template.
   New mail merge templates are created in the Settings area. More information: Work with Mail Merge Templates

7. If necessary, you can add or delete data fields. Microsoft Office Word supports up to 64 data fields, of which Microsoft Dynamics CRM for Outlook reserves two data fields to store the primary key and the record owner.
8. Click **OK**.
   Microsoft Dynamics CRM automatically opens a Microsoft Office Word document. In the **File Download** dialog box, click **Open**.

   This is not your mail-merge document. This is an interim page. Follow the directions in the Word document, including clicking **CRM**.
9. In the **Mail Merge Recipient** dialog box, verify that the list is accurate, and then click **OK**.
10. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation.

Tip

- To display the information you want and select the format, in the Mail Merge wizard, click **Address Block** and then **Greeting Line**.

To add data fields to display more information, click **More Items**. You can use up to 64 data fields.

11. If you are working in Microsoft Dynamics CRM for Outlook and you have either created a new template or updated an existing template, you can upload the template.
    - To save the document as a template, on the **Complete the Merge** pane, click **Upload Template to CRM**.

    If you are working in the Web application, you can upload the template in the Settings area. More information: Work with Mail Merge Templates
12. When you have completed work on the mail merge document, close it, and then delete the interim mail-merge document (Mail_Merge_nnnn.xml) and the associated text file (Mail_Merge_nnnn.txt) with the same name.

Warning Mail merge may leave sensitive data on your computer.

The mail merge process creates two files in addition to your mail merge documents. These files are the data sources used by mail merge and contain Microsoft Dynamics CRM data, which may include sensitive customer data. You should delete these data source files after you complete the mail merge.

Both files have the same name: Mail_Merge[nnnn], where *nnnn* is a 4-character, randomly generated number. One file is a.doc file and the other is a.txt file. Unless you moved the files or saved them to another directory, these files are usually in a temporary files folder on your computer.

13. If you are working in Microsoft Dynamics CRM for Outlook, after you print or send the document, you can choose to create activities for mail-merge items.
    1. In the **Create Activities** dialog box, click **Create Microsoft Dynamics CRM activities**.
    2. If you want to change the default values for the activity, click **Activity Details**, and then make any changes. To save the changes, click **OK**.
    3. Under **Assign activities to**, select to whom the new activities should be assigned.

4. You can choose to have the new activities closed immediately. E-mail activities are closed as soon as the messages are sent.
5. If you are creating a mail merge from a marketing list, you can also make the mail merge a quick campaign and include an link in e-mail messages for customers to remove themselves from your marketing lists.
6. Click **OK** to save the changes and create the activities.

Closed activities appear in the history list of the customer record. Open activities appear in the activities list of the customer record and in your list of active activities.

Note

If an account or contact does not have a valid e-mail address or has the **Do Not Allow** option set for **Bulk E-mail**, the message is not sent to them, and no e-mail activity is created.

Print a quote with a mail-merge document

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can use a mail-merge template to generate a customer-ready document that displays data from a saved quote, and that includes a header and a footer.

In Microsoft Dynamics CRM for Outlook, only one mail merge can be run at a time. If you want to discontinue a mail merge, close Microsoft Office Word. You can run multiple mail merge processes at the same time in the Web application.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the quote you want to print. If you want to use mail merge with a new quote, before starting the mail merge, save the quote first.
3. On the Actions toolbar, click **Print Quote for Customer** .
4. If you have other languages installed, you can select a language to filter the list of templates.
5. In the **Mail Merge** dialog box, select the type of document you want to use.

Note

If the **E-mail** option is not available, the **Enable Direct E-mail via Mail Merge** option in the **System Settings** may be set to **No**. More information: Manage System Settings

6. Select if you want to start with a blank document or a template. If you select a template option, click the **Lookup** button to select a template.
   New mail merge templates are created in the Settings area. More information: Work with Mail Merge Templates
7. If necessary, you can add or delete data fields. Microsoft Office Word supports up to 64 data fields, of which Microsoft Dynamics CRM for Outlook reserves two data fields to store the primary key and the record owner.

While working with quotes, removing or re-arranging data fields may cause the quote to not display or print properly. The footer displays after "LastItem", which marks the end of the quote data fields.

8. Click **OK**.
   Microsoft Dynamics CRM automatically opens a Microsoft Office Word document. In the **File Download** dialog box, click **Open**.

   This is not your mail-merge document. This is an interim page. Follow the directions in the Word document, including clicking **CRM**.

9. In the **Mail Merge Recipient** dialog box, verify that the list is accurate, and then click **OK**.
10. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation.

Tip

- To display the information you want and select the format, in the Mail Merge wizard, click **Address Block** and then **Greeting Line**.

To add data fields to display more information, click **More Items**. You can use up to 64 data fields.

11. If you are working in Microsoft Dynamics CRM for Outlook and you have either created a new template or updated an existing template, you can upload the template.
    - To save the document as a template, on the **Complete the Merge** pane, click **Upload Template to CRM**.

    If you are working in the Web application, you can upload the template in the Settings area. More information: Work with Mail Merge Templates

12. When you have completed work on the mail merge document, close it, and then delete the interim mail-merge document (Mail_Merge_nnnn.xml) and the associated text file (Mail_Merge_nnnn.txt) with the same name.

Warning Mail merge may leave sensitive data on your computer.

The mail merge process creates two files in addition to your mail merge documents. These files are the data sources used by mail merge and contain Microsoft Dynamics CRM data, which may include sensitive customer data. You should delete these data source files after you complete the mail merge.

Both files have the same name: Mail_Merge[nnnn], where *nnnn* is a 4-character, randomly generated number. One file is a.doc file and the other is a.txt file. Unless you moved the files or saved them to another directory, these files are usually in a temporary files folder on your computer.

13. If you are working in Microsoft Dynamics CRM for Outlook, after you merge the new document, you can choose to create Microsoft Dynamics CRM activities for mail-merge items.
    1. In the **Create Activities** dialog box, click **Create Microsoft Dynamics CRM activities**.
    2. If you want to change the default values for the activity, click **Activity Details**, and then make any changes. To save the changes, click **OK**.
    3. Under **Assign activities to**, select to whom the new activities should be assigned.

4. You can choose to have the new activities closed immediately. E-mail activities are closed as soon as the messages are sent.
5. If you are creating a mail merge from a marketing list, you can also make the mail merge a quick campaign and include an link in e-mail messages for customers to remove themselves from your marketing lists.
6. Click **OK** to save the changes and create the activities.

Closed activities appear in the history list of the customer record. Open activities appear in the activities list of the customer record and in your list of active activities.

Note

If an account or contact does not have a valid e-mail address or has the **Do Not Allow** option set for **Bulk E-mail**, the message is not sent to them, and no e-mail activity is created.

Create a mail merge document with marketing lists

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create a mail merge for a marketing list that is part of a campaign.

In Microsoft Dynamics CRM for Outlook, only one mail merge can be run at a time. If you want to discontinue a mail merge, close Microsoft Office Word. You can run multiple mail merge processes at the same time in the Web application.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
   You can also open a marketing list from a campaign.
2. On the Actions toolbar, click **Mail Merge on List Members** .
3. If you have other languages installed, you can select a language to filter the list of templates.
4. In the **Mail Merge** dialog box, select the type of document you want to use.

▸ Note

If the **E-mail** option is not available, the **Enable Direct E-mail via Mail Merge** option in the **System Settings** may be set to **No**. More information: Manage System Settings

5. Select if you want to start with a blank document or a template. If you select a template option, click the **Lookup** button to select a template.
   New mail merge templates are created in the Settings area. More information: Work with Mail Merge Templates
6. If necessary, you can add or delete data fields. Microsoft Office Word supports up to 64 data fields, of which Microsoft Dynamics CRM for Outlook reserves two data fields to store the primary key and the record owner.

7. Click **OK**.
   Microsoft Dynamics CRM automatically opens a Microsoft Office Word document. In the **File Download** dialog box, click **Open**.

   This is not your mail-merge document. This is an interim page. Follow the directions in the Word document, including clicking **CRM**.

8. In the **Mail Merge Recipient** dialog box, verify that the list is accurate, and then click **OK**.
9. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation.

Tip

- To display the information you want and select the format, in the Mail Merge wizard, click **Address Block** and then **Greeting Line**.

To add data fields to display more information, click **More Items**. You can use up to 64 data fields.

10. If you are working in Microsoft Dynamics CRM for Outlook and you have either created a new template or updated an existing template, you can upload the template.
    - To save the document as a template, on the **Complete the Merge** pane, click **Upload Template to CRM**.

    If you are working in the Web application, you can upload the template in the Settings area. More information: Work with Mail Merge Templates

11. When you have completed work on the mail merge document, close it, and then delete the interim mail-merge document (Mail_Merge_nnnn.xml) and the associated text file (Mail_Merge_nnnn.txt) with the same name.

Warning Mail merge may leave sensitive data on your computer.

The mail merge process creates two files in addition to your mail merge documents. These files are the data sources used by mail merge and contain Microsoft Dynamics CRM data, which may include sensitive customer data. You should delete these data source files after you complete the mail merge.

Both files have the same name: Mail_Merge[nnnn], where *nnnn* is a 4-character, randomly generated number. One file is a.doc file and the other is a.txt file. Unless you moved the files or saved them to another directory, these files are usually in a temporary files folder on your computer.

12. If you are working in Microsoft Dynamics CRM for Outlook, you can choose to create Microsoft Dynamics CRM activities for mail merge items.
    1. In the **Create Activities** dialog box, click **Create Microsoft Dynamics CRM activities**.
    2. If you want to change the default values for the activity, click **Activity Details**, and then make any changes. To save the changes, click **OK**.
    3. Under **Assign activities to**, select to whom the new activities should be assigned.
    4. You can choose to have the new activities closed immediately. E-mail activities are closed as soon as the messages are sent.

5. If you are creating a mail merge from a marketing list, you can also make the mail merge a quick campaign and include an link in e-mail messages for customers to remove themselves from your marketing lists.
6. Click **OK** to save the changes and create the activities.

Closed activities appear in the history list of the customer record. Open activities appear in the activities list of the customer record and in your list of active activities.

Note

If an account or contact does not have a valid e-mail address or has the **Do Not Allow** option set for **Bulk E-mail**, the message is not sent to them, and no e-mail activity is created.

Manage Activities

Create or edit an activity

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. To add new activities from the **Activities** list, on the Actions toolbar, click **New**.

   – OR –

   To add a new activity from a record, click **New Activity**. You can also click the activity icons on the Actions toolbar, or on the **New** menu, point to **New Activity**, and then select the activity type.

▸ Tip

To quickly create a follow-up activity from a record, in the Actions toolbar, click **Follow Up** , fill in the details in the Form Assistant pane, and then click **Save**.

3. Select an activity type, and then click **OK**.
4. Enter the information that you want. At a minimum, entering information in the following boxes is useful when you or others in your organization refer to the activity at a later date:

   - **Subject**
     Enter a meaningful description that can help you easily identify the activity in the Activities list view. The subject field is required because, by default, most of the Activities views are sorted by it. This field is not related to Subjects, which are the hierarchical list of categories used to relate and organize information in Microsoft Dynamics CRM.

- **Regarding**
  This field is used to link the activity to another record so that you can view the activity from the record. If you create a new activity from a record, this is automatically filled out.
- **Owner**
  This box represents the user who owns the activity. By default, it is set to the user who creates the activity.
- **Duration**
  If this activity is related to a case, make sure that you record the time you spend on the activity in this box. If the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer. The maximum duration of an appointment or service activity is 10 days.
- **Due**
  Enter the date and time that the activity is expected to take place or be completed. You can quickly sort on the **Due** field when you view activities.

Tip

To automatically update the Regarding field with information from a record, click the **Expand** button in the right pane to open the Form Assistant pane, and then select a record.

5. Some activities also have the following optional fields:
   - **Sender**
     You can use this field to record the user in your organization who initiated an outgoing communication. Alternatively, if this is an incoming communication from a customer, you can select the lead, account, or contact who initiates the communication. The sender must be a valid Microsoft Dynamics CRM account, contact, or lead, but can also be a Microsoft Dynamics CRM user. By default, this box contains the name of the user who creates the activity.
   - **Recipient**
     This is the person, typically an account, contact, lead, or Microsoft Dynamics CRM user, that receives the communication.
   - **Category**, **Sub-Category**
     You can use these text fields to categorize tasks so that you can sort or view your tasks by category and/or sub-category.
6. Click **Save** or **Save and Close**.

Tip

If you are using the activity to track something that has already been completed, on the **File** menu, click **Save as Completed**.

Notes

- To create the same activity for multiple records, use a quick campaign. More information: Work with Quick Campaigns

- You cannot edit multiple activities at once.
- You cannot schedule recurring activities.
- You cannot edit closed activities.
- You cannot change one activity into another type of activity.
- You cannot set reminders in Microsoft Dynamics CRM for Microsoft Office Outlook for faxes, phone calls, e-mails, letters, or campaign responses activities created in the Web application or Microsoft Dynamics CRM for Outlook.
- When the duration of an activity is more than 60 minutes (an hour), the time you enter is converted into hours. When the activity is saved, the value is rounded up and might change from the entry that was originally displayed when it was converted from minutes into hours. Note that rounding is only observed on the hundredth of an hour. The exact value for the duration, however, is stored in the database in minutes, and this value is used to calculate the total billing time when resolving cases.
- The letter and fax activities record when the letter or fax is sent or received. When you create the activity, you attach the letter or fax document, such as a Microsoft Office Word file, to the record. With the mail merge feature, you can write your letter and include Microsoft Dynamics CRM data. More information: Create Customer-Ready Documents and Messages

Create and send an e-mail activity in the Web application

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create and send e-mail activities from Microsoft Dynamics CRM from the Activities area. E-mail messages sent from Microsoft Dynamics CRM do not appear in the Microsoft Dynamics CRM mail folders in Outlook.

1. Start Microsoft Dynamics CRM 4.0.
2. In the Navigation Pane, click **Workplace**, and then click **Activities**.
3. On the Actions toolbar, click **New**.
4. In the **New Activity** dialog box, click **E-mail**, and then click **OK**.
5. On the **E-mail** tab, you must enter the following information.
   - **From**
     Locate and select the sender's name.
   - **To**
     Locate and select one or more recipients. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Subject**
     Type a subject for your e-mail message.
   - **Duration**
     This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.

- **Due**
  If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.
- Enter any additional information you want. Use the Formatting toolbar
  You cannot enter HTML tags or insert images into the body text of the message.

Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the recipient has access to the Web site.

6. You can also attach an article, template, or file to an e-mail activity.

To attach an article

a. To look up and select an article, on the Formatting toolbar, click **Insert KB Article**.
b. Use the **Search** tab to specify conditions or criteria to locate the article.
c. In the results list, select the article, and then click **OK**.
   The article appears the body of in your e-mail message.
d. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.
b. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.
c. Click **OK**.
   The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.
d. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.
b. On the **Attachments** tab, click **New E-mail Attachment**.
c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.
d. Click **Attach**.

To send the message immediately, click **Send**.

The message is sent and the new closed activity appears in the History area with an assigned message number appended to the **Subject** column and the date sent in the **Actual End** column.

– OR –

To send the message at a later time, click **Save and Close**. The new draft activity appears in the Activities area. You can delete draft messages.

To send the message, in the list of activities, open the e-mail activity, and click **Send**.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- You can view the sent date of an e-mail message on the **Activities** list. The **Actual End Date** is the date the message was sent and closed.
- You can forward or reply to an e-mail activity, but you cannot resend it.
  To reply to only the original sender, on the Actions toolbar, click **Reply**.
  To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.
  To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.
- There is no spelling checker built into Microsoft Dynamics CRM. There may be third-party solutions available. For more information, visit Microsoft Dynamics CRM Solution Finder.

Close an activity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Activity types that can be closed

- Tasks
- Faxes
- Phone Calls
- Letters
- Appointments
- Service Activities
- Campaign Activities

Unless you have created an activity record by mistake, it is better to close or convert an activity than to delete it. You can view closed or converted activities at a later date for reference, or run reports to determine the success rate of your activities.

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.
3. On the **Actions** menu, click **Close** *activity type*. For example, if you are in a task record, click **Close Task**.
4. In the confirmation dialog box, select the status that you want from the **Status** list, such as **Completed** or **Canceled**, and then click **OK**.

Notes

- When you close an activity, the activity becomes read-only and cannot be edited or reopened.
- To view closed activities, do one of the following:
  - In the Activities list, select the **Closed Activities** view.
  - Use Advanced Find, and specify **Activity Status** in the search criteria.
  - From an Account, Contact, Lead, or Opportunity record, under **Details**, click **History**. In the **Filter on** and **Include** lists, select the view options that you want.
- It is not possible to close multiple activities at once.

- The only way to close an e-mail activity is to send it. If you do not use Microsoft Dynamics CRM to send or receive e-mail, click **Send**. This will close the activity, but no e-mail message will be sent.

Convert an activity to an opportunity

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

▸ Activity types that can be converted

- Faxes
- Phone Calls
- E-mail Messages
- Letters
- Appointments

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.
3. On the Actions toolbar, click **Convert Activity**, and then click **To Opportunity**.
4. In the **Convert Activity to Opportunity** dialog box, enter information in the following boxes:
   - **Customer**

     You must click the **Lookup** button to select or create a new customer.
   - **Source Campaign**
     Click **Lookup** if you want to associate a source campaign with this activity.
   - **More Actions**
     By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion.
     - Close the activity as completed.
     - Open the new opportunity after the conversion.
     - Create a campaign response based on the information included in the opportunity. **Important** If you are converting an activity to an opportunity that is not associated with a Source Campaign, you must clear the **Record a closed campaign response** check box.

     To change the conversion operations, clear the associated check boxes.
5. In the **Convert Activity to Opportunity** dialog box, click **OK**.

6. Click **Save** or **Save and Close**.

Note

The originating activity becomes a related activity for the new opportunity. If the activity is open, it appears in the **Activities** list for the opportunity. If the activity is closed, it appears in the **History** list.

Convert an activity to a case

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.

Activity types that can be converted

- Faxes
- Phone Calls
- E-mail Messages
- Letters
- Appointments

3. On the Actions toolbar, point to **Convert Activity** and then to **Case**.
4. In the **Convert Activity to Case** dialog box, enter information in the following boxes:
   - **Customer**

     You must click the **Lookup** button to select or create a new customer.
   - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:
     - Close the activity as completed.
     - Open the new case after the conversion.

   To change the conversion operations, clear the associated check boxes.

5. In the **Convert Activity to Case** dialog box, click **OK**.

Note

The originating activity becomes a related activity for the new case. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **History** list.

Convert an e-mail to a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the e-mail activity that you want to convert.
3. On the Actions toolbar, point to **Convert Activity** and then to **To Lead**.
4. In the **Convert E-mail to Lead** dialog box, enter information in the following boxes:
   - **First Name**
   - **Last Name**
   - **Company**
   - **E-mail Address**
   - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:
     - Open the new lead after the conversion, if all the required information for the lead is available. Otherwise this option is not available.
     - Close the e-mail form.

   To change the conversion operations, clear the associated check boxes.

5. Click **OK**.

Notes

- The originating activity becomes a related activity for the new lead. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **History** list.
- The icon in the Activities list changes.

Assign an activity to a user or queue

Can I do this task?

If the **Assign** button is not visible on the toolbar, the security role assigned to your account does not have permission to assign this type of record. To check your permissions for a specific record, open the record, click the **File menu** button , and then click **Properties**.

More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. In the list of records, select the record that you want.

Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.
- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click the **Assign** button .

In the **Assign to Queue or User** dialog box, type all or part of the queue or user name, and then click the **Lookup** button .

In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.

In the **Search for records** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .

In the list of records, click a record to select it, click the **Add Selected Records** button to add the record to the **Selected records** list, and then click **OK**.

On the **User or Queues** form, click **OK**.

Work with Integrated Instant Messaging

Work with Integrated Instant Messaging

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

If you have Microsoft Office Communicator 2007, MSN Messenger, or Live Messenger installed, you can send an instant message to any user, contact, or opportunity, or lead in Microsoft Dynamics CRM with an e-mail address and using one of the instant messaging applications listed.

Note You may need to add the Microsoft Dynamics CRM server URL to the list of Internet Explorer trusted sites for the online presence to display. See online Help in Internet Explorer for instructions.

Record types and columns that can display online presence

- Contact records: **Full Name**
- Lead records: **Primary Contact**
- Opportunity records: **Potential Customer**
- All customer records: **Users**
- All customer records: **Owner**
- All customer records: **Modified By**

To access the Communicator menu, click the **Online Presence Jewel** .

- A green jewel indicates the person can receive an instant message and is available.
- A red jewel indicates the person is busy. You can send a message, but they may not respond immediately.
- A yellow jewel indicates the person is away or out of the office.
- A peach jewel indicates the person's online status is unknown. There are other communication methods available from the menu.

Enabling online presence

There are two ways to enable the online presence for a personal view. By adding the associated e-mail address for a user or contact, enables online presence on the related column. For example, adding the owner's e-mail column to a view, enables the presence on the owner column. See the list above.

If you do not want to include the e-mail column, you can also customize the view to enable online presence.

These two example procedures describe how to add a presence to a saved view. If you have the correct permissions, you can also edit a system view for an entity to enable the presence. More information: Work with Views

To add an e-mail column to a saved view

a. In the list view you want to add online presence, click **Advanced Find**.

b. In the **Advanced Find** form, click **Edit Columns**.

c. In **Common Tasks**, click **Add Columns**

d. Select one of the e-mail related checkboxes, for example: **E-mail**.

e. Click **OK** twice.

f. In the **Advanced Find** form, click **Find**.

To save the view, click **Back to Query**, and then on the Actions toolbar, click **Save As**.

To enable the online presence on a column in a saved view

a. In the Accounts or Contacts area, click **Advanced Find**.

b. In the **Advanced Find** form, click **Edit Columns**.

c. Do one of the following:

a. Select one of the columns that can display online presence, such as **Full Name** and then click **OK**.

b. Select the column, and then click **Change Properties**.

c. Select the **Enable Presence for this column** check box, and then click **OK**.

d. To save your changes and close the dialog box, click **OK**.

e. In the **Advanced Find** form, click **Find**.

To save the view, click **Back to Query**, and then on the Actions toolbar, click **Save As**.

Note

You cannot enable presence on columns for related record types, or on deleted columns.

Managing E-mail Activities

You can create, preview, track, and save e-mail messages and relate them to the specific accounts, contacts, cases, and other records. These e-mail messages are tracked as activity records, and can be sent to customers and other internal users, or saved as drafts for future editing. This helps you create a complete history of your interaction with your customers.

Working with E-mail Activities in Microsoft Dynamics CRM

You can work with e-mail messages in Microsoft Dynamics CRM in any one of the following areas:

- **Activities area.** E-mail messages are listed with the rest of the activities and you can create e-mail messages from the toolbar or the **New** menu.

  More information: Managing Communication Activities

- **Quick Campaign area.** You can use the **Create Quick Campaign** wizard to create and send e-mail to advertise products and sales to your customers as part of a marketing campaign. Campaign responses appear in the response folder, in addition to the Activities area.

  More information: Understanding Quick Campaigns

- **Workflow area.** You can use workflow rules to send customer service-related e-mail messages to customers and to the resources and customer service representatives that service the account.

More information: Creating and Using Workflows

- **Bulk Mail area.** You can create and send e-mail messages to multiple customers at the same time. You cannot use attachments with bulk mail.

  More information: Send Direct E-mail to Customers

- **Queues area.** You can accept or reassign e-mail messages from a queue. Deleting messages from a queue does not delete them from Microsoft Dynamics CRM. More information: Creating Queues for Incoming Cases

Working with E-mail Messages

How you work with e-mail messages depends on how your organization has set up e-mail. Some organizations chose to only use Microsoft Dynamics CRM to record that messages were sent and received, but not actually send or receive them from the application. Your organization can also use Exchange to send and receive e-mail. Other organizations chose to use Microsoft Dynamics CRM for Outlook to work with messages. How you access your e-mail is determined by your administrator and the e-mail access configuration in your user record.

Working with E-mail Messages Microsoft Dynamics CRM

If your administrator has set up Microsoft Dynamics CRM to manage your e-mail you can receive, read, reply, forward, and attach files and notes to e-mail messages.

- You cannot resend sent e-mail messages.
- Customers who have opted out of marketing messages
- E-mail messages may be sent to customers for whom you do not have a valid e-mail address or who have an e-mail address that is associated with more than one record, but doing so may cause an alert to appear.
- Your system administrator can specify settings to manage how Microsoft Dynamics CRM manages e-mail messages without a valid Microsoft Dynamics CRM customer.
- You can attach notes and documents to an e-mail message after you save it.

Working with E-mail Activities in Outlook

If you prefer to work with your e-mail activities in Outlook you can create and manage e-mail messages from the Microsoft Dynamics CRM for Microsoft Office Outlook. By using the Microsoft Dynamics CRM Address Book in Outlook, you have access to the e-mail addresses of your customers and other users in your organization.

View your e-mail in the Microsoft Office Outlook mailbox or in Microsoft Dynamics CRM as a closed e-mail activity. Note that if you receive all your e-mail as a Microsoft Dynamics CRM e-mail activity, the activities can be accessed by anyone who can view your activities. More information: Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook

You can save all or some of your Outlook e-mail messages as Microsoft Dynamics CRM records. Outlook, Microsoft Dynamics CRM checks incoming e-mail for messages to save and track based on your personal options. This option can be set in the Personal Options dialog box. More information: Set Personal Options

Working with E-mail Messages from other E-mail Applications

If your organization has installed the Microsoft Dynamics CRM E-mail Router, you can use an e-mail application other than Microsoft Dynamics CRM for Outlook to send and receive your e-mail. If you use a POP3 e-mail system, you need to provide your system administrator with a server name and e-mail address to connect.

More information: Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook

Personal and Organization-wide E-mail Templates

Microsoft Dynamics CRM provides e-mail templates for the organization. Organization templates are available for general use, but only users who have the appropriate administrator privileges can delete or edit them. Microsoft Dynamics CRM also gives users personal e-mail templates. Even when a personal template is available for general use, only the person who has ownership rights to a personal template can delete or edit it.

When you create a personal or an organizational e-mail template, you must first pick a template type based on if the e-mail message will be sent to an account, contact, lead, or other Microsoft Dynamics CRM record type. The template type determines which e-mail address or addresses the template uses when the e-mail is sent. Microsoft Dynamics CRM checks for specific e-mail addresses depending on the template type that is used.

More information: Work with E-mail Templates

E-mail templates for Microsoft Office Word are also available as both personal and organization templates, but are managed separately. More information: Work with Mail Merge Templates

Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook

When you are working in Microsoft Dynamics CRM for Microsoft Office Outlook, you can use all the familiar Outlook buttons and toolbars with the Microsoft Dynamics CRM toolbar and menu to manage e-mail messages and most other activities. At any time, you can track an Outlook e-mail message in Microsoft Dynamics CRM. Tracked messages still appear in the Outlook mail folders. There is a personal option setting to change the icon with a Microsoft Dynamics CRM **Tracked in CRM** icon . A copy of the e-mail message is saved as an activity and is available in the Microsoft Dynamics CRM Activities area. You can link the activity to a record in Microsoft Dynamics CRM. You can also set your personal options so that all incoming e-mail is tracked in Microsoft Dynamics CRM.

More information: Set Personal Options

Important

Because Microsoft Dynamics CRM shares data between users, many of the default privacy assumptions of a full e-mail system do not apply. This means that an e-mail activity that is associated with a Microsoft Dynamics CRM record as a regarding record (for example, a case, account, or contact) has the same visibility as any other activity associated with that record, and any user who has access to the record and its associated activities also has access to the e-mail message.

Managing Incoming E-mail

When you use Microsoft Dynamics CRM for Outlook, all the e-mail you receive arrives in your Outlook Inbox, and only e-mail that originated as a Microsoft Dynamics CRM e-mail activity (that is, a response to e-mail you send from Microsoft Dynamics CRM), or that is marked as tracked in Microsoft Dynamics CRM, arrives in the Microsoft Dynamics CRM Activities and My Work: Queues area. If you prefer, you can:

- Track all incoming e-mail as Microsoft Dynamics CRM e-mail activities.
- Track only e-mail that originated in Microsoft Dynamics CRM (that is, e-mail sent in response to a Microsoft Dynamics CRM e-mail activity) into Microsoft Dynamics CRM e-mail activities.
- Track only e-mail related to your accounts, contacts, or leads.

If you choose not to track all incoming e-mail, you can manually track selected messages in Outlook as e-mail activities in Microsoft Dynamics CRM.

However, if you track all your e-mail messages as Microsoft Dynamics CRM e-mail activities, they can be accessed by anyone who has permission to view or work with your activities. Also, when you track an e-mail message with attachments to a Microsoft Dynamics CRM activity, the attachments are included in the activity. If you do not want these attachments to be available to other users, delete them from the e-mail activity.

More information: Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records

Sending and Replying to E-Mail Messages

You can link Microsoft Dynamics CRM e-mail activities to active contacts, accounts, leads, facilities, equipment, queues, or users in Microsoft Dynamics CRM. You can select active Microsoft Dynamics CRM records with e-mail addresses from the Microsoft Dynamics CRM address book, which is installed automatically when you install Microsoft Dynamics CRM for Outlook. E-mail activities can also be tracked in Microsoft Dynamics CRM without being related to another record.

Microsoft Dynamics CRM

When you send, reply, or forward an e-mail that is tracked as a e-mail activity, a closed activity is created for each account and contact referenced and displayed in the History area. Closed e-mail activities cannot be updated except to link them to a related Microsoft Dynamics CRM record. If a related record has not already been selected, you have the option of select one.

More information: Managing E-mail Activities

Working with Microsoft Dynamics CRM for Outlook with Offline Access Offline and Synchronizing with Microsoft Dynamics CRM

If you install Microsoft Dynamics CRM for Outlook with Offline Access, you have the option of working offline from the Microsoft Dynamics CRM server. You can create Microsoft Dynamics CRM e-mail messages that are sent when you go back online. If you send Outlook e-mail messages, those are sent immediately.

More information: Synchronizing Information

When you are working with Microsoft Dynamics CRM for Outlook with Offline Access offline, if you create and send an e-mail message and the message fails to be delivered or is blocked, for example, because the recipient does not want to receive e-mail or the mail server is down, the e-mail is saved to your **Drafts** folder in Outlook, but a closed Microsoft Dynamics CRM activity is created. In Microsoft Dynamics CRM, you can use the Pending E-mail view to unsent messages. When you are working offline, Microsoft Dynamics CRM e-mail messages that you send are saved to your Outlook offline queue, and when you go online, Microsoft Dynamics CRM automatically tries to send them and create the activities. If an e-mail message cannot be sent, it is saved in Microsoft Dynamics CRM as a draft activity, but does not appear in your **Drafts** folder in Outlook.

More information: Working Offline

Using the Microsoft Dynamics CRM Address Book

You can use the Microsoft Dynamics CRM address book to select records from Microsoft Dynamics CRM in Outlook. The address book includes accounts, contacts, facilities/equipment, leads, queues, and users. You can access the Microsoft Dynamics CRM address book from the same menu as your other Outlook address books and use it in the same way.

The address book is also used to reconcile e-mail recipients in incoming messages to Microsoft Dynamics CRM contacts and link them automatically. How the contacts are matched is set in your personal options.

More information: Set Personal Options

Work with E-mail Activities

and send an e-mail activity in the Web application

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create and send e-mail activities from Microsoft Dynamics CRM from the Activities area. E-mail messages sent from Microsoft Dynamics CRM do not appear in the Microsoft Dynamics CRM mail folders in Outlook.

1. Start Microsoft Dynamics CRM 4.0.
2. In the Navigation Pane, click **Workplace**, and then click **Activities**.
3. On the Actions toolbar, click **New**.
4. In the **New Activity** dialog box, click **E-mail**, and then click **OK**.
5. On the **E-mail** tab, you must enter the following information.
   - **From**
     Locate and select the sender's name.
   - **To**
     Locate and select one or more recipients. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Subject**
     Type a subject for your e-mail message.
   - **Duration**
     This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.
   - **Due**
     If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.
   - Enter any additional information you want. Use the Formatting toolbar
     You cannot enter HTML tags or insert images into the body text of the message.

Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

6. You can also attach an article, template, or file to an e-mail activity.

To attach an article

a. To look up and select an article, on the Formatting toolbar, click **Insert KB Article**.

b. Use the **Search** tab to specify conditions or criteria to locate the article.

c. In the results list, select the article, and then click **OK**.
The article appears the body of in your e-mail message.

d. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.

b. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

c. Click **OK**.
The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

d. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

b. On the **Attachments** tab, click **New E-mail Attachment**.

c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

d. Click **Attach**.

To send the message immediately, click **Send**.
The message is sent and the new closed activity appears in the History area with an assigned message number appended to the **Subject** column and the date sent in the **Actual End** column.

– OR –

To send the message at a later time, click **Save and Close**. The new draft activity appears in the Activities area. You can delete draft messages.

To send the message, in the list of activities, open the e-mail activity, and click **Send**.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- You can view the sent date of an e-mail message on the **Activities** list. The **Actual End Date** is the date the message was sent and closed.
- You can forward or reply to an e-mail activity, but you cannot resend it.
  To reply to only the original sender, on the Actions toolbar, click **Reply**.
  To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.
  To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.
- There is no spelling checker built into Microsoft Dynamics CRM. There may be third-party solutions available. For more information, visit Microsoft Dynamics CRM Solution Finder.

Create an e-mail message in Outlook

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create e-mail messages in Microsoft Office Outlook by using either the Microsoft Dynamics CRM forms or the Outlook forms. By default, the e-mail messages that have been marked for tracking are synchronized in Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM, and when you reply to or forward an e-mail message from this message, the Outlook forms open. The option that allows you to chose which form to use does not affect this.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. Do one of the following:

▸ Create an e-mail message in an Outlook form

1. On the Microsoft Office Outlook Standard toolbar, click **New**.
2. In the **New** menu, click **Mail Message**.
3. In the Outlook form, you can use either your Outlook contacts or your Microsoft Dynamics CRM contacts. For more information, see Microsoft Office Outlook Help.
4. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.
   After you send the message, the **View in CRM** button becomes available.
5. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.
6. On the **Outlook** toolbar, click **Send**.
   The e-mail message appears in your Microsoft Dynamics CRM folders. The icon changes to the **Track in CRM** button . The sent e-mail activity is saved as a Microsoft Dynamics CRM e-mail activity and appears in the Microsoft Dynamics CRM Activities area.
   An e-mail activity is not created until the message is sent.

To view the contact record, on the Microsoft Dynamics CRM toolbar click, **View in CRM**.

▸ Create an e-mail message in a form

This procedure does not create an Outlook e-mail message. These e-mail messages only appear in the Microsoft Dynamics CRM for Outlook folders and do not appear the Outlook **Sent Items** folder.

You can edit a draft e-mail message by following steps 1 through 2 to navigate to the Activities area in Microsoft Dynamics CRM for Outlook. Then, open the record you want to edit.

1. In the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, expand **Workplace**.
2. Under **Workplace**, expand **My Work**, and then expand **Activities**.
3. In the Activities area, on the **Actions** menu, click **New**.
4. In the **New Activity** dialog box, click **E-mail**, and then click **OK**.
5. On the **E-mail** tab, you must enter the following information.
   - **From**
     Locate and select the sender's name.
   - **To**
     Locate and select one or more recipients. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Subject**
     Type a subject for your e-mail message.
   - **Duration**
     This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.
   - **Due**
     If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.
   - Enter any additional information you want. Use the Formatting toolbar
     You cannot enter HTML tags or insert images into the body text of the message.

   Tip

   - You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
   - You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

6. You can also attach an article, template, or file to an e-mail activity.

   To attach an article

   a. To look up and select an article, on the Formatting toolbar, click **Insert KB Article**.

b. Use the **Search** tab to specify conditions or criteria to locate the article.

c. In the results list, select the article, and then click **OK**.
The article appears the body of in your e-mail message.

d. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.

b. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

c. Click **OK**.
The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

d. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

b. On the **Attachments** tab, click **New E-mail Attachment**.

c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

d. Click **Attach**.

To send the message immediately, click **Send**.
The message is sent and the new closed activity appears in the History area with an assigned message number appended to the **Subject** column and the date sent in the **Actual End** column.

– OR –

To send the message at a later time, click **Save and Close**. The new draft activity appears in the Activities area. You can delete draft messages.

To send the message, in the list of activities, open the e-mail activity, and click **Send**.

Important: If you are working offline, e-mail messages sent from the e-mail form will not be sent until you go back online. The status will still be **Closed**. You can view a list of unsent e-mail from the Activities list, with the **My Pending E-mails** view.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- After a message is sent, the status is changed to **Closed** and displayed in the **History** folder. You cannot change the status or edit the message, except to link a record in the **Regarding** box, if one has not been selected.
- You can forward or reply to an e-mail activity, but you cannot resend it.
  To reply to only the original sender, on the Actions toolbar, click **Reply**.
  To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.
  To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

From a list of records, including the results of a search You can run a quick campaign from any list of accounts, contacts, or leads.

a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

- **For Selected Records**
  Select this option if you have selected one or more records in the list.
- **For All Records on Current Page**
  Select this option to include all records on the page for the quick campaign activity.
- **For All Records on All Pages**
  Select this option to include all records on all pages for the quick campaign activity.

From the **Marketing Lists** list You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Select the marketing list or marketing lists for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

From a marketing list You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Double-click the marketing list for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**.

4. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

Notes

- You cannot add additional records to a quick campaign after you have created it.
- In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). This choice affects who can see and take action on an activity. For example, if you were creating a phone call activity for all of the sales representatives, you could select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative could then see the activity and take action on it. However, if you were creating a large number of e-mail activities that Microsoft Dynamics CRM would perform automatically, you could assign the e-mail activity to yourself instead of the record owners.
- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Resolve red text in e-mail message addresses

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

E-mail messages that appear as red text with the **Unresolved Address** button cannot be matched to records in Microsoft Dynamics CRM. These messages contain e-mail addresses that are either not related to a user, account, contact or lead record, or are related to multiple records. You can either match the e-mail address to an existing record or create a new one.

1. Open the message.
2. Double-click the unresolved e-mail address.
3. In the **Resolve Address** dialog box, do one of the following procedures:

▸ If the e-mail address belongs to an existing user, account, contact, or lead

- Click **Resolve to an existing record**. Click the **Lookup** button to search for records.

▸ If the e-mail address is not in the system

a. Click **Resolve to a new record**, select a record type, and then click **Go**.
b. Complete the form, and then click **OK**

Click **OK**.

Set the option to send and receive e-mail from a user or queue

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: E-mail Permissions

If this option is not set correctly, e-mail is not sent and a warning message "This message has not been submitted for delivery" appears.

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.

   – OR –

   In the Navigation Pane, click **Settings**, click **Business Management**, and then click **Queues**.

2. Open the user or queue you want to modify.
3. Under **E-mail Access Configuration**, select how e-mail will be accessed for incoming and outgoing mail.
   - **None**
     E-mail will not be sent or received.
   - **Forward Mailbox**
     E-mail will be forwarded from another e-mail address.
   - **Microsoft Dynamics CRM for Outlook**
     E-mail is sent and received with Microsoft Dynamics CRM for Outlook.
   - **E-mail Router**
     E-mail is sent and received with the Microsoft Dynamics CRM E-mail Router. If this item is selected, the **Allow credentials** check box is displayed. To require that credentials be entered, select the check box.
4. Click **Save** or **Save and Close**.

Notes

- If you have selected an e-mail option, verify that there is a valid e-mail address in the **E-mail** box.
- If you select **Microsoft Dynamics CRM for Outlook** as your e-mail option, you must also allow Microsoft Dynamics CRM to send mail through Microsoft Dynamics CRM for Outlook.

Convert an e-mail to a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the e-mail activity that you want to convert.
3. On the Actions toolbar, point to **Convert Activity** and then to **To Lead**.
4. In the **Convert E-mail to Lead** dialog box, enter information in the following boxes:
   - **First Name**
   - **Last Name**
   - **Company**
   - **E-mail Address**
   - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:
     - Open the new lead after the conversion, if all the required information for the lead is available. Otherwise this option is not available.
     - Close the e-mail form.

   To change the conversion operations, clear the associated check boxes.

5. Click **OK**.

Notes

- The originating activity becomes a related activity for the new lead. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **History** list.
- The icon in the Activities list changes.

Convert an activity to a case

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.

Activity types that can be converted

- Faxes
- Phone Calls
- E-mail Messages
- Letters
- Appointments

3. On the Actions toolbar, point to **Convert Activity** and then to **Case**.
4. In the **Convert Activity to Case** dialog box, enter information in the following boxes:
   - **Customer**

     You must click the **Lookup** button to select or create a new customer.
   - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:
     - Close the activity as completed.
     - Open the new case after the conversion.

   To change the conversion operations, clear the associated check boxes.

5. In the **Convert Activity to Case** dialog box, click **OK**.

Note

The originating activity becomes a related activity for the new case. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **History** list.

Work with E-mail Templates

E-mail templates provide boilerplate text and Microsoft Dynamics CRM data for e-mail messages. These templates cannot be used with Microsoft Office Word mail merges.

Concepts:

- Managing E-mail Activities
- Work with Mail Merge Templates

Create or edit an e-mail template

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

An e-mail template is attached to an e-mail message after it is created. The template that can be attached to an e-mail depends on which type of record the template is related to. For example, you can only attach a case e-mail template to an e-mail activity created from a case record. Global templates are available for any record type. You can create personal templates that are available only to you, or organizational templates that are available to anyone in your organization.

You cannot add an attachment to a template. You can either attach files to individual messages after they are created with the template, or save the file to a public Web site and include a Web address in the template.

This feature is not available in Microsoft Dynamics CRM for Outlook. Use Microsoft Office Word mail merge templates instead. More information: Create Customer-Ready Documents and Messages

1. Do one of the following.

▸ To work with organization templates

a. In the Navigation Pane, click **Settings**, click **Templates**, and then click **E-mail Templates**.

– OR –

▸ To work with personal templates

- On the **Tools** menu, click **Options**, and then click the **E-mail Templates** tab.

On the Actions toolbar, click **New**.

In the **E-Mail Template** dialog box, in the **Template Type** list, select the type, and then click **OK**.

Important The template is available only for the selected record type, such as a lead or opportunity. This cannot be changed. To use the same content for another record type, create a new template.

On the **E-mail Templates** form, you must enter the following information.

- **Title**
  Enter a meaningful and descriptive title for the template. The title displays in the list of templates.
- **Subject**
  Enter the subject of the e-mail message created with this template. This appears as the Subject line in the e-mail message and overwrites the existing text.

You can enter a description of the template. This is not displayed to the recipient.

Enter the text you want to send in this message. Use the Formatting toolbar to edit the text.

Tips

- Although you cannot insert images or HTML directly into Microsoft Dynamics CRM e-mail messages or e-mail templates, you can use the copy feature in Internet Explorer to copy an image from a Web site and paste it into the e-mail message or e-mail template. The image is available as long as the Web site is accessible.
- To include a hyperlink in an e-mail template, type the URL including the http://, for example, http://www.microsoft.com and then press Enter. Do not include a period or comma or a space after the URL, or the link will break. A link is automatically added to the URL and the text is underlined and changed to blue.
- There is no spelling checker built into Microsoft Dynamics CRM. There may be third-party solutions available. For more information, visit Microsoft Dynamics CRM Solution Finder.
- The Formating toolbar has limited fonts and font sizes. However, you can copy and paste content from Microsoft Office Word. This allows you to take advantage of features such as spell checking and some advanced text formatting. To single-space a line of text, at the end of the line press Shift+Enter.

To insert data fields to display information such as a customer's name or data from a quote, from Microsoft Dynamics CRM records, in the **Actions** toolbar, click **Insert/Update**, and then in the **Data Field Values** dialog box, click **Add**. In the **Add Data Value** dialog box, select the **Record Type** and **Field** and then click **OK**. Click **OK** again to insert the data.

Tip

Use the **Default Text** box to define what text displays if the record does not have data for the field.

Click **Save** or **Save and Close**.

If necessary, click **OK** to close the **Set Personal Options** dialog box.

Notes

- To change a shared template to a personal one or to a shared one, on the template form, on the **Actions** menu, click **Revert to Personal Template** or click **Make Template Available to Organization**.
- If you use an e-mail template as a signature in addition to another template, insert the signature template first, otherwise, the Subject line will be overwritten.

Add and edit the data fields in an e-mail template

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

Data fields are used with e-mail templates in the Web application. You can use custom fields, attributes, and entities with e-mail templates.

This procedure does not work for Microsoft Office Word mail merge templates. You can use Microsoft Office Word templates.

1. In the e-mail template, on the Form toolbar, click **Insert/Update**.
2. In the **Data Field Values** dialog box, do one of the following:
   - To add a field, click **Add**, and then in the **Add Data Value** dialog box, select the record type and field you want to add, and then click **OK**.
     The field appears in the **Data Field Values** list.
   - To change the order in which your data fields appear, select the field, and then click **Move Up** or **Move Down**.
   - To provide substitute text for a field if there is no data, select the field, and then type the text in the **Default Text** box.
   - To remove a data field, select the field, and then click **Delete**.
   - To insert the data fields into the e-mail template, click **OK**.
3. You can change the format for text displayed in a data field. Select the field, double-click the text, and then highlight the yellow text in the field, and then make the changes you want. If you select the field itself, you will not be able to reformat the text it contains because format changes must be applied directly to text and not to a field as a whole.
4. Click **Save** or **Save and Close**.

Important

- If you want multiple data fields to appear on your template, you must add each data field individually and for one record type at a time. For example, if you want to create data fields for the first name and last name, you must perform step 2 twice, once to create a data field for the first name, and again to create a data field for the last name. If you add multiple data fields at once, Microsoft Dynamics CRM automatically adds a semicolon (;) between each data field and treats it as an **EITHER/OR** statement. Using the example of first name and last name, Microsoft Dynamics CRM looks for a first name, and if one is available, displays it. If a first name is not available, Microsoft Dynamics CRM then looks for a last name, and displays it. It will not display both names.
- If you want to include data from different record types, repeat step 2 and select a different record type.

Increasing Your Efficiency

Personalizing Microsoft Dynamics CRM

Configuring Personal Options

Viewing Your User Information

In Microsoft Dynamics CRM you can view your personal information in your personal profile, though you may not be able to update it. This information includes your name, contact information, working hours, the teams and resource groups you belong to, as well as the services you can perform. You can also review your security roles. Understanding your security role is key to knowing what you can and cannot view, create, or edit in Microsoft Dynamics CRM.

Personalizing Microsoft Dynamics CRM

Every user has the option of configuring his or her personal workspace within Microsoft Dynamics CRM. You can change how Microsoft Dynamics CRM displays information, including:

- What links appear in your **Workplace**
- How many records display in lists
- Your language preferences
- How to display numbers and dates

More information: View Your User Profile

Creating Personal Views

You can create personal views of lists by creating custom Advanced Find queries and then saving them as views.

More information: Find Things

Managing Your E-mail

You can create personal e-mail templates that you can reuse with your e-mail messages. If you are using an e-mail service other than Microsoft Dynamics CRM for Microsoft Office Outlook, you can update your e-mail password.

More information: Managing E-mail Activities

Synchronizing with Microsoft Dynamics CRM

If you use Microsoft Dynamics CRM for Outlook, you can change how Microsoft Dynamics CRMlooks for you as well as what information is synchronized and how often.

More information: Synchronizing Information

Set Personal Options

You can set your personal options for Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook. Not all options are available for both the Web application and Microsoft Dynamics CRM for Outlook.

View your user profile

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Your user profile displays information about you, including general information such as your contact information and addresses, what teams and resource groups you belong to, which services you can perform, and your work hours and security roles. This information is visible to the entire organization. Depending on your security role, you may be able to make changes to your user profile.

If you are working in Microsoft Dynamics CRM for Outlook, you can view this information from the User form. More information: Work with Your User Record and Work Hours

1. Under **Workplace**, click the **Personalize Workplace** link.
2. In the **Set Personal Options** dialog box, click the **General** tab.
3. At the bottom of the page, click the **View your user profile here** link.
   The User form with your information opens.
4. To view details or make changes, under **Details** or **Service** click any of the following:
   - Teams
   - Roles
   - Quotas
   - Work Hours
   - Services
   - Resource groups
   - Workflows
5. To close the form, on the **File** menu, click **Close**.
6. To close the **Set Personal Options** dialog box, click **OK**.

Set start page and view options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can update the options that determine how Microsoft Dynamics CRM displays information. Not all settings on this tab are available in Microsoft Dynamics CRM for Outlook.

1. Under **Workplace**, click the **Personalize Workplace** link.

   – OR –

   In Outlook, in the Microsoft Dynamics CRM menu bar, click **Options**.

2. In the **Set Personal Options** dialog box, on the **General** tab, you can set any of the following options:

- **Select activity forms used by Microsoft CRM client for Outlook**
  Select the forms that you want to use to create activities in Microsoft Dynamics CRM for Outlook.
- **Default Pane**
  Select the area that you want to display when you open Microsoft Dynamics CRM. This option is not available in Outlook.
- **Default Tab**
  Select the tab that you want to display when you open Microsoft Dynamics CRM. This option is not available in Outlook.
- **Records Per Page**
  Select the number of records you want to display in a list. The number of records displayed can affect the performance of Microsoft Dynamics CRM.
- **Advanced Find Mode**
  Select the display mode for Advanced Find, which also affects Microsoft Dynamics CRM for Outlook data groups, and report filtering. The **Simple** mode only lets you change the values. The **Detailed** mode displays the Filter toolbar and lets you add additional criteria.
- **Time Zone**
  If you are in a different time zone than the rest of your organization, select the time zone for your current location. This option is not available in Outlook.
  If you are using the Microsoft Dynamics CRM for Outlook, we recommend that the Microsoft Dynamics CRM time zone be set to the same time zone as Outlook, otherwise issues with mismatched times and dates could occur.
- **Currency**
  Click the **Lookup** button to select the currency to display.
- **View your user profile here**
  Click the **View your user profile here** link to view your user record in Microsoft Dynamics CRM. This option is not available in Outlook.
- **Always run the Microsoft Dynamics CRM application hoster process**
  Select this check box if you want Microsoft Dynamics CRM for Outlook to run continuously in the background, even if Outlook is not running. This will improve how quickly pages are displayed. This option is not available in the Web application.
- **Enable high contrast**
  Select this check box if you have turned on High Contrast settings in either your browser or operating system. This option improves the display of buttons and icons for accessiblity.

3. To save your changes and close the dialog box, click **OK**.

Set synchronization options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select which record types you want to synchronize between Outlook and Microsoft Dynamics CRM for Outlook and how often you want to synchronize between applications. This tab is not available in the Web application.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Options**.
3. In the **Set Personal Options** dialog box, on the **Synchronization** tab, you can select which record types are synchronized:
   - **Appointments I'm attending**
     Select this option if you want to synchronize appointments and service activities in which you are a participant and have accepted the appointment.
   - **My tasks**
     Select this option if you want to synchronize tasks that you own in Microsoft Dynamics CRM.
   - **Contacts**
     Select this option if you want to synchronize contacts that you own in Microsoft Dynamics CRM.
     If you delete a contact you own in Microsoft Dynamics CRM or in Microsoft Dynamics CRM for Outlook, it will not be deleted in the other application.
   - **My phone calls**
     Select this option if you want to synchronize phone calls that you own in Microsoft Dynamics CRM.
   - **My letters**
     Select this option if you want to synchronize letters that you own in Microsoft Dynamics CRM.
   - **My faxes**
     Select this option if you want to synchronize faxes that you own in Microsoft Dynamics CRM.
4. If you want to include company names from Outlook contacts, select **Update Company fields with parent account names**.
   Important: This setting only affects newly tracked contacts. Future changes are not synchronized.
5. If you have more than one computer running Microsoft Dynamics CRM for Outlook, select this computer to be the synchronizing client.
6. If your organization permits it, you can define how often Microsoft Dynamics CRM items in your Microsoft Dynamics CRM for Outlook folders are updated:
   - **Synchronize the CRM items in my Outlook folders every**
     Select this option and select the number of minutes. You can increase the amount of time between synchronization of items in your Microsoft Dynamics CRM for Outlook folders. Your administrator sets the minimum time allowed between synchronization.
7. Select how duplicates are handled during synchronization:

- **Create the duplicates**
  This option allows records to be created even if key fields contain the same data.
  More information: Avoiding Duplicate Records
- **Do not create duplicates**
  This option blocks records from being created if key fields contain the same data.

8. To save your changes and close the dialog box, click **OK**.

Set Workplace pane options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select which areas and record types are displayed in the Navigation Pane when you view your Workplace. By default, the My Work area and the Customers area appear in the Navigation Pane in both Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook.

1. Under **Workplace**, click the **Personalize Workplace** link.

   – OR –

   In Outlook, in the Microsoft Dynamics CRM menu bar, click **Options**.

2. In the **Set Personal Options** dialog box, on the **Workplace** tab, select the areas you want to display. The Preview pane displays each area and its sub-areas.
   - **Sales**
     This area displays marketing list, orders, invoices, leads, opportunity, and quotes.
   - **Marketing**
     This area displays marketing lists, campaigns, and quick campaigns.
   - **Service**
     This area displays cases, contracts, and the knowledge base.
   - **Scheduling**
     This area displays the Service calendar.
     The option to select this area is not available in the Microsoft Dynamics CRM for Outlook, but the area displays.
3. To save your changes and close the dialog box, click **OK**.

Set Activities options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can set the default view for your Workplace calendar, and set your working hours. This tab is not available in Microsoft Dynamics CRM for Outlook.

1. Under **Workplace**, click the **Personalize Workplace** link.
2. In the **Set Personal Options** dialog box, on the **Activities** tab, you can make changes to the following options:
   - **Default Calendar**
     Select whether you want your default calendar view to be by day, week, or month.
   - **Start Time** and **End Time**
     Select the time you start and end your work day. This affects scheduling and your calendars.
3. To save your changes and close the dialog box, click **OK**.

Set regional options for yourself

You can control how Microsoft Dynamics CRM displays numbers, currencies, times, and dates in your account.

Can I do this task?

This task requires permissions that are found in all default security roles. This task can be performed only in the Web application. More information: Common Task Permissions

1. Under **Workplace**, click the **Personalize Workplace** link.

   – OR –

   In Outlook, in the Microsoft Dynamics CRM menu bar, click **Options**.
2. Click the **Formats** tab.
3. From the **Current Format** list, select the name of the language and region that corresponds to the format you want to use.
4. To save your changes and close the dialog box, click **OK**.

Tip

In addition to selecting a predefined combination of language and region, you can also personalize number, currency, time, and date formats. To personalize these formats, click **Customize**.

Create or edit an e-mail template

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

An e-mail template is attached to an e-mail message after it is created. The template that can be attached to an e-mail depends on which type of record the template is related to. For example, you can only attach a case e-mail template to an e-mail activity created from a case record. Global templates are available for any record type. You can create personal templates that are available only to you, or organizational templates that are available to anyone in your organization.

You cannot add an attachment to a template. You can either attach files to individual messages after they are created with the template, or save the file to a public Web site and include a Web address in the template.

This feature is not available in Microsoft Dynamics CRM for Outlook. Use Microsoft Office Word mail merge templates instead. More information: Create Customer-Ready Documents and Messages

1. Do one of the following.

To work with organization templates

a. In the Navigation Pane, click **Settings**, click **Templates**, and then click **E-mail Templates**.

– OR –

To work with personal templates

- On the **Tools** menu, click **Options**, and then click the **E-mail Templates** tab.

On the Actions toolbar, click **New**.

In the **E-Mail Template** dialog box, in the **Template Type** list, select the type, and then click **OK**.

Important The template is available only for the selected record type, such as a lead or opportunity. This cannot be changed. To use the same content for another record type, create a new template.

On the **E-mail Templates** form, you must enter the following information.

- **Title**
  Enter a meaningful and descriptive title for the template. The title displays in the list of templates.
- **Subject**
  Enter the subject of the e-mail message created with this template. This appears as the Subject line in the e-mail message and overwrites the existing text.

You can enter a description of the template. This is not displayed to the recipient.

Enter the text you want to send in this message. Use the Formatting toolbar to edit the text.

Tips

- Although you cannot insert images or HTML directly into Microsoft Dynamics CRM e-mail messages or e-mail templates, you can use the copy feature in Internet Explorer to copy an image from a Web site and paste it into the e-mail message or e-mail template. The image is available as long as the Web site is accessible.
- To include a hyperlink in an e-mail template, type the URL including the http://, for example, http://www.microsoft.com and then press Enter. Do not include a period or comma or a space after the URL, or the link will break. A link is automatically added to the URL and the text is underlined and changed to blue.
- There is no spelling checker built into Microsoft Dynamics CRM. There may be third-party solutions available. For more information, visit Microsoft Dynamics CRM Solution Finder.
- The Formating toolbar has limited fonts and font sizes. However, you can copy and paste content from Microsoft Office Word. This allows you to take advantage of features such as spell checking and some advanced text formatting. To single-space a line of text, at the end of the line press Shift+Enter.

To insert data fields to display information such as a customer's name or data from a quote, from Microsoft Dynamics CRM records, in the **Actions** toolbar, click **Insert/Update**, and then in the **Data Field Values** dialog box, click **Add**. In the **Add Data Value** dialog box, select the **Record Type** and **Field** and then click **OK**. Click **OK** again to insert the data.

Tip

Use the **Default Text** box to define what text displays if the record does not have data for the field.

Click **Save** or **Save and Close**.

If necessary, click **OK** to close the **Set Personal Options** dialog box.

Notes

- To change a shared template to a personal one or to a shared one, on the template form, on the **Actions** menu, click **Revert to Personal Template** or click **Make Template Available to Organization**.
- If you use an e-mail template as a signature in addition to another template, insert the signature template first, otherwise, the Subject line will be overwritten.

Set how your e-mail is tracked

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can use an existing e-mail address to send and receive e-mail with Microsoft Dynamics CRM. After your system administrator sets up your e-mail address, you can update the password.

1. Under **Workplace**, click the **Personalize Workplace** link.
2. In the **Set Personal Options** dialog box, on the **E-mail** tab, select the option that you want from the **Track** list:
   - **All e-mail messages**
     All of the messages from the account listed in your user profile will be saved as Microsoft Dynamics CRM activities.
   - **E-mail messages in response to CRM e-mail**
     Only e-mail messages received as replies from messages sent from Microsoft Dynamics CRM will be saved as Microsoft Dynamics CRM activities.
   - **E-mail messages from CRM Leads, Contacts, and Accounts**
     Only e-mail messages received from leads and customers will be saved as Microsoft Dynamics CRM activities.
3. To save your changes and close the dialog box, click **OK**.

Set address book options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select how the address book is managed in Outlook and Microsoft Dynamics CRM for Outlook and how often you want to synchronize between applications. This tab is not available in the Web application.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Options**.
3. In the **Set Personal Options** dialog box, on the **Address Book** tab, you can select how contacts and other record types are synchronized, and whether or not e-mail recipients are linked to Microsoft Dynamics CRM records.
4. By default, the Outlook Address Book is synchronized with the Microsoft Dynamics CRM address book every 24 hours. If your organization permits it, you can change this interval. To change this interval, change the number between 1 and 60. Your administrator sets the minimum time allowed between synchronization.
5. To save your changes and close the dialog box, click **OK**.

Note

If you want to synchronize your address book manually, synchronize Microsoft Dynamics CRM manually. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Synchronize Outlook with CRM**.

Set local data synchronization options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

If your organization allows it, you can select how frequently you want to synchronize between Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook. This tab is not available in the Web application.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Options**.
3. In the **Set Personal Options** dialog box, on the **Local Data** tab, you can select how frequently the data on your local computer is synchronized.
4. By default, the Outlook local data is synchronized with the Microsoft Dynamics CRM address book every 15 minutes. To change this interval, select a number between 1 and 60. Your administrator sets the minimum time allowed between synchronization.
5. To save your changes and close the dialog box, click **OK**.

Note

You can start synchronization Microsoft Dynamics CRM manually. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Synchronize Outlook with CRM**.

Set privacy options

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can specify whether errors you encounter in Microsoft Dynamics CRM are sent to Microsoft. This data is used to improve the quality of Microsoft Dynamics CRM.

1. Under **Workplace**, click the **Personalize Workplace** link.

   – OR –

   In Outlook, in the Microsoft Dynamics CRM menu bar, click **Options**.

2. Click the **Privacy** tab, and select when to send an error report to Microsoft Dynamics CRM. For more information about the program, click the View Privacy Statement link.
3. To save your changes and close the dialog box, click **OK**.

Important

In the above options, if you chose to never send an error report, but continue to receive notification of script errors, disable script debugging in Microsoft Internet Explorer. For instructions about how to do this, see the Microsoft Internet Explorer Help.

Set language options

You can control the language in which the Microsoft Dynamics CRM user interface and Help are displayed.

Can I do this task?

This task requires permissions that are found in all default security roles. This task can be performed only in the Web application. More information: Common Task Permissions

1. Under **Workplace**, click the **Personalize Workplace** link.

   – OR –

   In Outlook, in the Microsoft Dynamics CRM menu bar, click **Options**.

2. Click the **Languages** tab.
3. From the **User Interface Language** list, select the language in which you want Microsoft Dynamics CRM to be displayed.
4. From the **Help Language** list, select the language in which you want Microsoft Dynamics CRM Help to be displayed.
5. To save your changes and close the dialog box, click **OK**.

View Your User Profile

View your user profile

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Your user profile displays information about you, including general information such as your contact information and addresses, what teams and resource groups you belong to, which services you can perform, and your work hours and security roles. This information is visible to the entire organization. Depending on your security role, you may be able to make changes to your user profile.

If you are working in Microsoft Dynamics CRM for Outlook, you can view this information from the User form. More information: Work with Your User Record and Work Hours

1. Under **Workplace**, click the **Personalize Workplace** link.
2. In the **Set Personal Options** dialog box, click the **General** tab.
3. At the bottom of the page, click the **View your user profile here** link.
   The User form with your information opens.
4. To view details or make changes, under **Details** or **Service** click any of the following:
   - Teams

- Roles
- Quotas
- Work Hours
- Services
- Resource groups
- Workflows

5. To close the form, on the **File** menu, click **Close**.
6. To close the **Set Personal Options** dialog box, click **OK**.

Requesting User Interface Changes

The user interface of Microsoft Dynamics CRM can be customized.

Because customizations affect all users, only a user with the System Administrator or System Customizer security role or equivalent permissions can make customizations. So if you see something that would make it easier to do your job, let your manager or system administrator know.

Common customizations include:

- Changing your permissions if needed to do your job.
- Changing the choices and the default value for each list, such as the industry values in accounts and leads, or the reasons for closing an activity, case, or lead.
- Changing the criteria that are used to determine if there are potential duplicate records.
- Changing the names of record types or the text labels used in forms and views to reflect the terminology used in your organization.
- Creating new record types and relationships to link them with other record types to capture information you need.
- Adding new fields on forms to track information that doesn't fit in existing fields.
- Hiding features you don't use to simplify your experience.
- Modifying the default reports.
- Changing which columns are displayed in views, the order columns are displayed, and how the views are sorted. For each record type, there are several types of views that can be changed:
  - The system views that appear in the **View** list.
  - The view that shows search results when you search with Advanced Find.
  - The view that shows search results when you type information in the **Search for records** box.
  - The view when you click a link in the **Details** area.
- Controlling which fields are searched when you type information in the **Search for records** box.

You cannot customize the values or default text in the **Filter on** and **Include** boxes in the **History** and **Activities** areas of records.

Export Data to Excel

You can export any list to Microsoft Office Excel, including the results of an Advanced Find search.

You can export to a static or dynamic Excel worksheet or to a PivotTable.

Export data to an Excel static worksheet

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. In any area with a list of records, select the columns to include in the exported list.
   By default, an exported worksheet includes the fields that are displayed in the list, using the same field order, sorting, and field widths.

   To make changes to the columns in an Advanced Find View, click **Edit Columns**. You can make the following types of changes:

Change the column order

To change the column order, select a column heading, such as **Account Name**, and then under **Common Tasks**, click the **Move Left** button or the **Move Right** button to move the column.

Add columns

a. To add columns to the export list, click **Add Columns**.
b. To add columns for the main record type, select it, and then in the **Add Columns** list, click to select fields that you want to add as columns.
c. To add columns from related records, first select the related record type, and then in the **Add Columns** list, click to select fields that you want to add as columns.
d. Click **OK**.

Configure sorting

To change the sort order, click **Configure Sorting**, in the **Column** list, select the column that you want to sort, in the **Order** area, click **Ascending Order** or click **Descending Order**, and then click **OK**.
You cannot sort on columns from related record types.

Change column width

To change the column width that will appear in the Excel worksheet, select a column heading, such as **Account Name**, click **Change Properties**. In the **Change Column Properties** dialog box, select the width (in pixels) that you want, and then click **OK**.

Remove columns

To remove a column, select the column heading that you want to remove, and under **Common Tasks**, click **Remove**, and then in the confirmation message, click **OK**.

You cannot change the columns for a system view, such as **All Active Accounts**. You must either customize the view, which requires the System Administrator or System Customizer security role, or use Advanced Find to create your own view based on the current view. To create your own view, with the system view open, click **Advanced Find**.

2. On the Actions toolbar, click the **Export to Excel** button .
3. In the **Export Data to Excel** dialog box, select **Static worksheet with records from this page**.

   – OR –

   Select **Static worksheet with records from all pages in the current view**.
   This option will be visible only when your view includes more than one page of records.
4. Click **Export**.
5. To view the static worksheet, click **Open**.
   If you are using Microsoft Office Excel 2007, you will see a message that says the file you are trying open is in a different format than specified by the file extension. Click **Yes**.
6. To save the exported data to a file, in Excel, on the **File** menu, click **Save**.

Tip

You can e-mail a static exported worksheet to anyone, or store it in a shared file. Anyone who opens the file will see all the data in the file, whether or not they are a Microsoft Dynamics CRM user or have privileges to view the data in Microsoft Dynamics CRM.

Notes

- There is potential for data loss if you export from Microsoft Dynamics CRM to a Microsoft Office Excel 2003 comma-separated value (CSV) file.

  To ensure that the file is exported correctly, you must have data in every row of the last column of the list you are exporting. You can add a space or other character in last column of the file or reorder the columns so that the last column always contains data. More information: Microsoft Knowledge Base Article 77295

- By default, in Microsoft Dynamics CRM, you cannot export a list of more than 10,000 records at a time to a static Excel worksheet. Your system administrator can change this. More information: Microsoft Knowledge Base Article 911395

By default, Microsoft Dynamics CRM lists up to 50 records per page. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.

Create, Edit, or Copy a Report Using the Report Wizard

Create, edit, or copy a report using the Report Wizard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

How to determine which record types have the data you need

There is one record type for each type of data, such as accounts, contacts, or services.

In addition, there are separate record types for:

- Notes. Every note and attachment is stored as a separate record in the Notes record type.
- Close activities. Whenever you close an opportunity, quote or order, an activity is created that tracks the reason for closing the record. These are stored respectively in the Opportunity Close Activity, Quote Close Activity, and Order Close Activity record types. When you close a case, the data is stored in the Case Resolution Activity.

If your report includes data from communication activities, you have two options:

- If you want data about multiple types of communication activities in one report such as the activity subjects and due dates for all types of activities, use the Activity record type.
- If you need specific information about a specific type of activity, such as the recipients, use the Task, E-mail Message, Fax, Appointment, Letter, or Phone Call record type.

Tip:

- While you are creating your report, keep a window open showing a record from the data type you are including in your report. It will help you determine which columns to include.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. To add a new report, click **New**, and then click **Report Wizard**.

   – OR –

   To edit an existing Report Wizard report, select the report, on the Actions toolbar, click **Edit Report** , and then click **Report Wizard**.
   You can only use the Report Wizard to edit reports that were created with the wizard.

3. Select a starting point for your report.
   a. To create a new report, select **Start a new report**.

      – OR –

      To start from a copy of an existing report, select **Start from an existing report**, select the report, and also clear the **Overwrite existing report** check box.

– OR –

To edit an existing report, select **Start from an existing report**, select the report, and check the **Overwrite existing report** check box.

b. If multiple languages are installed, select the language to use for column names, record types, and wizard-generated text in the report.

c. Click **Next**.

4. Enter the name of the report, and specify which record types the report will use.

The purpose of this step is to identify where the data in the report comes from. You can include data from one or two record types, plus data from related records.

a. Enter data in each field:

- **Report name**. This value will be displayed on the **Reports** menu and in the Reports area.
- **Primary record type**. Data from all fields in this record type and related record types will be available when you are defining criteria for which records to include. Data from this record type will be available when you are selecting fields to display.
- **Related record type**. If you need to display data from a related record type, select an additional record type here.

  Tip: If you don't need data from a related record type, don't select one, as it makes the report take longer to load.

b. Click **Next**.

5. Specify which records to include.

The purpose of this step is to determine which records are included in your report. This information is saved as the default filter for the report.

You can select criteria based on the selected record types or on columns from related records.

a. To include only records defined by an existing system view or saved view, select a view.

– OR –

To define which records to include by selecting criteria:

- To add a criteria row:
  1. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
  2. Click the query relational operator, and select an operator.
  3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
- To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped.

However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

a. For each row you want to group, click the **Select Row** button ▼ for that row, and then click **Select Row**.

b. On the Filter toolbar, select **Group AND** or **Group OR**.

c. To remove a row from a group, click the **Options menu** button ▼ for that row, and then click **Delete**.

d. To select a group, click the **Options menu** button ▼ for that group, and then click **Select Group**.

e. To add a criteria clause to a group, click the **Options menu** button ▼ for that group, click **Add Clause**, and then select the field, query relational operator, and value.

f. To unselect a group that has been previously selected, click the **Options menu** button ▼ for that group, and then click **Deselect Group**.

g. To ungroup a group, click the **Options menu** button ▼ for that group, and then click **Ungroup**.

h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button ▼ for that group, and then click **Change to OR** or **Change to AND**.

Click **Next**.

Organize and lay out your data.

The purpose of this step is to determine which columns to include, the order in which they are displayed, and whether to group data into subcategories. At a minimum, a report just includes columns. By grouping and summarizing the data, you make it easier to see the patterns.

For example, your report could use one level of grouping to group opportunities by salesperson, or add a second level of grouping to show each quarter's opportunities, or add a third level to show the percentage won and lost in each quarter.

To use a chart in your report, if your report has no grouping, you must select at least one numeric column. If your report uses grouping, you must select at least one numeric column with a summary type defined.

Define how to organize the report:

To group items so that they are organized together in the report by date or other common properties:

0. For each grouping level you need, click **Click here to add a grouping**.

1. Define the grouping:

- **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
- **Column**. The name of the Microsoft Dynamics CRM field that contains the data to define the grouping.
- **Time interval**. For datetime fields, group the data by Month, Day, Week, or Year.
- **Sort order**. Sort order for displaying the groups.

- **Column width**. Width of the column heading in pixels.
- **Summary type**. You can group records by a count of matching records.

2. To reorder the grouping levels, use the up and down arrows in the **Common Tasks** section.
3. Click **OK**.

To define the sort order within each group, click **Configure Sorting**, select a column and sort order, and then click **OK**.

To limit reports to groups with the highest or lowest values, click **Set Top or Bottom Number**:

0. Select **Top** or **Bottom**.
1. Select the number of groups to display.
2. Click **OK**.

Define which columns to display in the report. You can display columns that show data from a record, or columns that show summary information:

0. For each column you want to include, click **Click here to add a column**:
    - **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
    - **Column**. The name of the Microsoft Dynamics CRM field that contains the data to display or summarize.
    - **Data type**. The data type of the column, one of: primarykey, nvarchar, picklist, bit, decimal, int, float, money, ntext, datetime, owner, lookup.
    - **Name**. The name used in the database.
    - **Column width**. The width in pixels of the column.
    - **Summary type**. The specific type of summaries available depends on the data type of the column.
        - **None**: lookup, datetime, owner, picklist, bit, ntext
        - **Average**, **Maximum**, **Minimum**, **Percent of Total**, **Sum**: all numeric record types (decimal, int, float, money)
    - Use the left and right arrows to reorganize the columns.
1. Click **OK**.

Click **Next**.

Select whether to use a chart in the report.

The purpose of this step is to determine whether to use a chart, and which type of chart to use.

Select whether to include a chart:

- **Table only**. This provides a table grouped and sorted as you specified.
- **Chart and table**. Displays both a chart and table.
    - **Show table below the chart on same page**. Clicking on the chart does nothing.

- **Show chart. To view data for a chart region, click the chart region**. Clicking on an area in the chart will display a table with details for that section of the chart.

Click **Next**.

If the report includes a chart, format the chart.

The purpose of this step is to specify the type of chart, and how the data is displayed in the chart.

Select the chart type, and then click **Next**.
The **Chart preview** area shows how the data will be displayed.

- For vertical and horizontal bar charts and line charts, specify which data to display on each axis:
  - In the **Format Column (X) Axis** section, select the field to use for the X axis, and the label that is displayed on the chart for the field.
  - In the **Format Value (Y) Axis** section, you can select two fields. For each field, you can specify the label that is displayed on the chart.
  - In the **Format Labels and Legends** section, specify whether or not to show the data labels and a legend.
- For pie charts, specify the slices and values for the chart.
  - For slices, you must select one of the groupings in your report.
  - For values, you must select a numeric column with a summary type.

Click **Next**.

Review the summary of the report, click **Next**, and then click **Finish**.

Determine where the report can be run from.

When you finish defining the report, you return to the Report form, where you can update the name and description of the report, and determine where the report is displayed:

- **Categories**

  To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab

  By default, a new report is not put into any category. If you want the report to be included in the category views in the Reports area, such as the **Marketing Reports** view, add a category in the **Categories** box.

- **Related Record Types**
  To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

- **Display In**

  To specify where reports should be visible, click the **Select Values** button , and then select one or more options:

  - **Reports area**
    Report will be displayed in the Reports area.

- **Forms for related record types**
  Report will be displayed on the form for the record type you select in **Related Record Types**
- **Lists for related record types**
  Report will be displayed from specified list view pages.

If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

Tip: If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Test the report, and modify it if needed.

On the Report toolbar, click **Run Report** .
If the report needs modifications, start with step 2 and edit the existing report.

Determine who can use the report. By default, the report is a personal report. This means that you are the only one who can use it.

- To share this report with other users, in the Reports area, select the report, and then on the **More Actions** menu, click **Sharing**.
- To make this report available to everyone in the organization, in the Reports area, select the report, on the Actions toolbar menu, click **Edit Report**, and then on the **Actions** menu, click **Make Report Available to Organization**.

If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Note

All reports generated with the Report Wizard print in landscape mode.

Create and Work with Reports

Run a report

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Find and open a report:

From the Reports area

a. In the **Workplace**, under **My Work**, click **Reports**.

b. To narrow the list, enter the first few letters of the report name, or use the asterisk (*) wildcard in the **Search for records** box and then click the **Find** button . You can also select a view.

c. In the reports list, double-click the report that you want to run.

If the report has a default filter, the default filter will be displayed. Follow step 2 to change the filter.
Tip: To run a report without seeing the default filter, select the report, and then on the Actions toolbar, click **More Actions**, and then click **Run Report**.

From a list of records, including the results of an Advanced Find search

Only reports that relate to the current record type will be available.
You can run some reports on all records in the list, up to ten selected records, or without limiting the records as if you were running the report from the Reports area.

- To run a report on all records on the list:

  a. On the Actions toolbar, click **Reports** .

  b. Under **Run on Selected Records**, click the name of the report.

  c. In the **Select Records** dialog box, click **All records on all pages in the current view**, and then click **Run Report**.

- To run a report on up to ten selected records from the list:

  a. Select the records to include. Select several records by pressing the CTRL key while you click each record.

  b. On the Actions toolbar, click **Reports**.

  c. Under **Run on Selected Records**, click the name of the report.

  d. In the **Select Records** dialog box, click **The selected records**, and then click **Run Report**.

- To run a report without limiting records to items on the list:

  a. On the Actions toolbar, click **Reports**.

  b. If the report is listed under **Run on All Records**, select the report.

  – OR –

  Under **Run on Selected Records**, click the name of the report. In the **Select Records** dialog box, click **All applicable records**, and then click **Run Report**.

  – OR –

  If the report you want to run is not listed, you must go to the Reports area to run the report.

From a record

Only reports that relate to the current record type will be available.

To run a report including data from just one record:

a. With a record open, on the Actions toolbar, click **Reports** .

b. Under **Run on Current Record**, click the name of the report.

From Microsoft Dynamics CRM for Outlook

All reports can be run when you are online.

To run a report while you are offline, you must first create a local data group that includes the report, as well as a local data group that includes any data that should be included in the report.

To create a local data group that contains reports, on the **CRM** menu, click **Modify Local Data Groups**, click **New**, select the the **Report** record type, and then define the criteria for which reports to include. More information: Work with Data to Take Offline

- To run reports from the Reports area, in the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, click **Workplace**, click **My Work**, click **Reports**, and then select a report to run.
- To select a report from a record or list, follow the procedures above. These steps work the same way in Microsoft Dynamics CRM for Outlook.

From a report you saved locally

If you have saved a report on your computer or shared file system that reads dynamic data from Microsoft Dynamics CRM, to open it, browse to the folder that contains your saved report, and double-click the file.

If the report offers filter criteria, if needed, modify the filter criteria and then click **Run Report**.

The list of existing report filtering criteria is grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**.

To edit a parameter in simple mode, click the underlined value and enter a new value.

– OR –

To edit the filter criteria in detailed mode:

. Click **Edit Filter**.

a. To add a criteria row:

1. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
2. Click the query relational operator, and select an operator.
3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.

b. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

0. For each row you want to group, in detailed mode, click the **Options menu** button ▼ for that row, and then click **Select Row**.
1. On the Filter toolbar, select **Group AND** or **Group OR**.
2. To remove a row from a group, click the **Options menu** button ▼ for that row, and then click **Delete**.
3. To select a group, click the **Options menu** button ▼ for that group, and then click **Select Group**.
4. To add a criteria clause to a group, click the **Options menu** button ▼ for that group, click **Add Clause**, and then select the field, query relational operator, and value.
5. To unselect a group that has been previously selected, click the **Options menu** button ▼ for that group, and then click **Deselect Group**.
6. To ungroup a group, click the **Options menu** button ▼ for that group, and then click **Ungroup**.
7. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button ▼ for that group, and then click **Change to OR** or **Change to AND**.

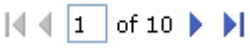
Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button ▼ for that row, and then click **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click the **Options menu** button ▼ for that row, and then click **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click the **Options menu** button ▼ for that row, and then click **Show in Simple Mode**.
- You can set your personal options so that report filters and Advanced Find criteria always open in simple or detailed mode. More information: Set Personal Options

If the report offers parameters, if needed, modify the parameters and then click **View Report**.

Locate data in the report.

- To view or change a record, click the first field in the row for the record. A separate Microsoft Dynamics CRM window will open with the record.
- To view all records associated with a summary or chart report, click **Show All** at the bottom of the report. To navigate back to the original report, click **Original Report** in the report title area.
- To view detailed information about an area in a chart, click an area of the chart. To navigate back to the original report, click **Original Report** in the report title area.

- To page through the report, on the Report toolbar, use the **Page Navigation** buttons  . To locate a specific page, type a page number in the box and then press **Enter**.
- To quickly locate specific information in your report, in **Find | Next**, type a few characters, and then click **Find**.
- To sort a column, click the column title. The direction of sorting is indicated by the **Ascending sort** button or the **Descending sort** button.
- To view or hide the filter summary, expand or collapse **Filter Summary**.
- To update your report, click the **Refresh** button.
- To hide the report parameters, click the **Hide Parameters** button. To display the report parameters, click the **Show Parameters** button.

Print the report. On the Report toolbar, click the **Print** button.

If you are working offline using Microsoft Dynamics CRM for Outlook, on the Report toolbar, select **Web archive** format, click **Export**, and then on the **File** menu, click **Print**.

Tips

- If a chart doesn't display the first time you export a report to **Web archive** format, export the report a second time.
- To print reports, you need a Reporting Services Microsoft ActiveX control. The first time you print a Reporting Services report from either Microsoft Dynamics CRM or Microsoft Dynamics CRM for Microsoft Office Outlook, you will see a prompt **Do you want to install this software?**.

  To install the required control, click **Install**.

Export the report.

Important The exported report is temporary. If you need to save the exported report to a local file, use the viewing program to save the file to disk. The saved exported report is no longer connected to Microsoft Dynamics CRM. Therefore, it does not change if Microsoft Dynamics CRM data changes.

. In the **Export** box, select a format, and then click **Export**.
A second browser window is used to display the report, using a viewer associated with the export format you selected.
The formats that are available are determined by the rendering extensions that are installed on the Microsoft SQL Server Reporting Services report server, and also by whether you are online or offline.

- If you are working offline, only the **Excel** and **Acrobat (PDF) file** formats are available.
- If you are using Microsoft SQL 2005 Workgroup edition, the **XML file with report data** format is not available.

If a viewer is not available for the format you select, you must select a different format or install the viewer.
The following export formats are included in a default installation when you are online. The list of export formats available to you may vary from those listed here.

- **Excel**
  View the report in Microsoft Office Excel. This format includes all the row, column, and field labels, in addition to report formatting.
  Large reports and reports with charts might not display with the expected formatting when exported in this file format. To export only the data, instead of using this format, from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, export the data into Microsoft Office Excel, and then save as a comma-delimited (CSV) file. More information: Export Data to Excel
- **Web archive**
  View the report in Microsoft Internet Explorer, as a MIME-encoded HTML format that keeps images and linked content together with a report. For chart reports, if the chart is not displayed correctly the first time that you export the report, export the report again.
  Choose this format to view a report offline or for e-mailing the report.
- **Acrobat (PDF) file**
  View the report using a client-side PDF viewer. You must have Adobe Acrobat Reader to use this format.
  Choose this format for long reports, paginated reports, or reports that are delivered as a file.
- **TIFF file**
  View the report in the default TIFF viewer. For some Windows clients, this is the Windows Pictures and Fax Viewer.
  Choose this format to a view a report in a page-oriented layout. The TIFF format is the recommended format for printing reports.
- **CSV (comma delimited)**
  View the report as a text file, with fields separated by commas. This format includes all the row, column, and field labels.
  To export only the data, instead of using this format, export data from any list in Microsoft Dynamics CRM, including results of Advanced Find searches, into Microsoft Office Excel, and then save as a comma-delimited (CSV) file.
- **XML file with report data**
  View the report as an XML file.

Tips

- If there is no report that gives you the information you need, you can either export data to Microsoft Office Excel, or create your own report. More information: Export Data to Excel, Create and Work with Reports
- If a snapshot of a Reporting Services report exists, you can view it from the Reports area. To see if any snapshots exist for a report, click the **View Snapshots** button next to the report. If a snapshot exists, click the snapshot link to view the snapshot.

Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: Set Personal Options

Add a report without using the Report Wizard

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. To add a new report, click **New**.

Add a new file that reads data from the Microsoft Dynamics CRM database.

You can add a static file, or a dynamic Microsoft Office, Microsoft SQL Server Reporting Services or other ODBC-compliant file that reads data from the Microsoft Dynamics CRM database.

1. In the **Source** section, in the **Report Type** box, select **Existing File**.
2. In the **File Location** box, enter the path and file name of the dynamic or static file to add, or click **Browse** to locate the file.

   When you add a new Reporting Services report, if the report is enabled for pre-filtering and the report doesn't already have a default filter, a default filter that limits the data in the report to records modified within the past 30 days that have status set to active is added.

   For information about creating Microsoft Office files or other ODBC-compliant files that read directly from the Microsoft Dynamics CRM database, see: Write a Report Using Report-Writing Tools.

Tips

- To change a file that has been added as a report, you must download it, make any changes, and then add it again.
- By default, the maximum size of the file that you can upload is 4 megabytes (MB). This can be changed by your system administrator. More information: Microsoft Knowledge Base Article 295626

Add a new link to a Web page

1. In the **Source** section, in **Report Type**, select **Link to Web page**.
2. In the **Web Page URL** box, enter the URL of the Web page to add.

Specify the properties for the report.

- **Name**

  The name for the report that is shown in the Reports area and on the **Reports** menu in forms and lists.

- **Description**

  The description that is displayed in the Reports area.

- **Parent Report**
  If this report is a sub-report or a drill-through report, specify an existing parent report. If this is not specified, the parent report will display a "Report not found" error.
- **Categories**
  To specify the categories in which to include this report, click the **Select Values** button, and then select the categories. More information: System Settings Dialog Box - Reporting Tab
- **Related Record Types**
  To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button, and then select record types.
  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.
- **Display In**
  To specify where reports should be visible, click the **Select Values** button, and then select one or more options:
  - **Reports area**
    Report will be displayed in the Reports area.
  - **Forms for related record types**
    Report will be displayed on the form for the record type you select in **Related Record Types**
    If the report is enabled for pre-filtering, from the record, users can specify running the report on the current record.
  - **Lists for related record types**
    Report will be displayed from specified list view pages.
    If the report has pre-filtering enabled, from the list view, users can specify running the report on selected records.
- If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.
- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

Click **Save** or **Save and Close**.

The report is added as a personal report.

Tips

- To share this report with other users, in the Reports area, select the report, and then on the **More Actions** menu, click **Sharing**.
- To make this report available to everyone in the organization, in the Reports area, select the report, on the Actions toolbar menu, click **Edit Report**, and then on the **Actions** menu, click **Make Report Available to Organization**.

- If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Edit report properties

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report, and on the Actions toolbar, click **Edit Report** .
3. Specify the properties for the report:
   - **Source**
     This section specifies the source file for the report. If you are just changing properties for the report, do not change the information in this section.
   - **Name**
     The name for the report that is shown in the Reports area and on the **Reports** menu in forms and lists.
   - **Description**
     The description that is displayed in the Reports area.
   - **Parent Report**
     If this report is a sub-report or a drill-through report, specify an existing parent report. If this is not specified, the parent report will display a "Report not found" error.
   - **Categories**
     To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab
   - **Related Record Types**
     To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
     For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.
   - **Display In**
     To specify where reports should be visible, click the **Select Values** button , and then select one or more options:
     - **Reports area**
       Report will be displayed in the Reports area.
     - **Forms for related record types**
       Report will be displayed on the form for the record type you select in **Related Record Types**

       If the report is enabled for pre-filtering, from the record, users can specify running the report on the current record.

- **Lists for related record types**
  Report will be displayed from specified list view pages.

  If the report has pre-filtering enabled, from the list view, users can specify running the report on selected records.

- If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.
- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

4. Click **Save** or **Save and Close**.

Tips

- To see all reports, including sub-reports that are not visible in the default view, select the **All Reports, Including Sub-Reports** view.
- If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Note

If multiple Language Packs are installed, only reports that are marked for display in the language you specified in Personal Options will be visible. More information: Set Personal Options

Create a new report from an existing report

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

To copy a Report Wizard report and modify it using Report Wizard, see Create, Edit, or Copy a Report Using the Report Wizard.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select a report.
   To see all reports, including sub-reports that are not visible in the default view, select the **All Reports, Including Sub-Reports** view.
3. On the Actions toolbar, click **Edit Report** , and then on the **Actions** menu, click **Download Report**.
4. Click **Save**, and specify the location in which to save the file. If you are creating a new report rather than modifying a report, rename the file.

   Whenever a Microsoft SQL Server Reporting Services report is downloaded, the datasource for the report is changed to Adventure_Works_Cycle_MSCRM. This is done for security reasons: you can

share the.RDL file with the report without worrying about revealing your database name. You will need to change the datasource name back to the name of your Microsoft Dynamics CRM database prior to uploading changes to the file.

5. In the **Download Complete** dialog box, click **Close**.
6. To copy a report and add it to Microsoft Dynamics CRM:
   a. Follow the previous steps to download the file.
   b. Copy the downloaded file and rename the copy.
   c. For Reporting Services reports, change the datasource name in the report to the name of your Microsoft Dynamics CRM database.
   d. Make any changes required to the new report. For Reporting Services reports, use Reporting Services Report Designer. You will need a report development environment:

▸ How to set up a report development environment

Install the required components on your computer:

- Microsoft Visual Studio, or any product that uses the Visual Studio.NET integrated development environment (such as Microsoft Visual Basic.NET).
- Reporting Services Report Designer
  Reporting Services Report Designer 2005 can be installed from the Microsoft SQL Server 2005 CD, and requires Visual Studio.NET 2005.
- Make sure a security role assigned to your account includes the Publish Reports and Add Reporting Services Reports privileges.

In addition to the required components, the following documentation is helpful:

- *Report Writers Guide* section of the *Microsoft CRM 4.0 Software Development Kit*. More information: Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)
- *Reporting Services Books Online* provides help for Reporting Services. More information: SQL Server 2005 Reporting Services Books Online

   e. Add the new report back to Microsoft Dynamics CRM.

▸ **Tip**

If you don't want users to run the base report you started from:

1. In the Reports area, select the report.
2. On the Actions toolbar, click **Edit Report** .
3. On the **Actions** menu, click **Revert to Personal Report**.

Note

When you download a drill-through report created with the Report Wizard, and edit the downloaded report in Reporting Services Report Designer, there are manual changes required. More information: Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)

Edit the default filter for a report

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

If a report is a Microsoft SQL Server Reporting Services report, is enabled for pre-filtering, and has a default filter, you can change the default filter that will be used each time any user runs the report.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select a report.
   To see all reports, including sub-reports that are not visible in the default view, select the **All Reports, Including Sub-Reports** view.
3. On the Actions toolbar, click **More Actions**, and then click **Edit Default Filter**.
4. Modify the filter criteria.

   The criteria are grouped by record types that you can use in the filter, such as **Accounts** or **Contacts**.

   - To edit an existing row, click the query relational operator and select an operator, or click the underlined value and enter a new value.
   - Click the query relational operator, and select an operator.
   - To add a criteria row:
     a. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
     b. Click the query relational operator, and select an operator.
     c. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
   - To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.
     a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.
     b. On the Filter toolbar, select **Group AND** or **Group OR**.
     c. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
     d. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
     e. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
     f. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.

g. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.

h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button for that row, and then click **Delete**.

5. Click **Save Default Filter**.
6. Click **Save** or **Save and Close**.

Edit a default report or create a Reporting Services report

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

The default reports in Microsoft Dynamics CRM are all Reporting Services reports. Default reports cannot be edited with the Report Wizard. To edit the default reports or create a new Reporting Services report other than one created by using the Report Wizard, you need a report development environment:

How to set up a report development environment

Install the required components on your computer:

- Microsoft Visual Studio, or any product that uses the Visual Studio.NET integrated development environment (such as Microsoft Visual Basic.NET).
- Reporting Services Report Designer
  Reporting Services Report Designer 2005 can be installed from the Microsoft SQL Server 2005 CD, and requires Visual Studio.NET 2005.
- Make sure a security role assigned to your account includes the Publish Reports and Add Reporting Services Reports privileges.

In addition to the required components, the following documentation is helpful:

- *Report Writers Guide* section of the *Microsoft CRM 4.0 Software Development Kit*. More information: Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)
- *Reporting Services Books Online* provides help for Reporting Services. More information: SQL Server 2005 Reporting Services Books Online

1. Identify the existing report that is closest in design to your new report.

2. Download the report from Microsoft Dynamics CRM to a computer that is set up with the report development environment.

   a. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.

   b. On the Actions toolbar, click **Edit Report** , and then on the **Actions** menu, click **Download Report**.

   c. Click **Save**, and specify the location in which to save the file. If you are creating a new report rather than modifying a report, rename the file.

   d. In the **Download Complete** dialog box, click **Close**.

3. In a product using the Visual Studio integrated development environment (IDE), open the report, and make the required changes.
   If you are making major changes, first read Writing Reporting Services Reports (Microsoft Dynamics CRM SDK).

4. Add the report to Microsoft Dynamics CRM.

   a. In the Microsoft Dynamics CRM Reports area, click **New**.

   b. In the **Report Type** box, select **Existing File**.

   c. In the **File Location** box, enter the path and file name of the dynamic or static file to add, or click **Browse** to locate the file.

   d. Edit the report properties:

   - **Name**
     The name for the report that is shown in the Reports area and on the **Reports** menu in forms and lists.
   - **Description**
     The description that is displayed in the Reports area.
   - **Parent Report**
     If this report is a sub-report or a drill-through report, specify an existing parent report. If this is not specified, the parent report will display a "Report not found" error.
   - **Categories**
     To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab
   - **Related Record Types**
     To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
     For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.
   - **Display In**
     To specify where reports should be visible, click the **Select Values** button , and then select one or more options:
     - **Reports area**
       Report will be displayed in the Reports area.
     - **Forms for related record types**
       Report will be displayed on the form for the record type you select in **Related Record Types**

If the report is enabled for pre-filtering, from the record, users can specify running the report on the current record.

- **Lists for related record types**
  Report will be displayed from specified list view pages.

  If the report has pre-filtering enabled, from the list view, users can specify running the report on selected records.

- If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.
- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

e. Click **Save**.

f. To modify the filter for the report, on the Actions toolbar, click **More Actions**, and then click **Edit Default Filter**.

Tips

- To share your new file with other users, do one of the following:
  - Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
  - If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
  - Put the report in a shared file system.
  - E-mail the report to other Microsoft Dynamics CRM users in the same domain.
- If you don't want users to run the base report you started from:
  1. In the Reports area, select the report.
  2. On the Actions toolbar, click **Edit Report** .
  3. On the **Actions** menu, click **Revert to Personal Report**.

Create one-time or scheduled Reporting Services report snapshots

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

To create a snapshot of a Reporting Services report, you create a snapshot definition, which can be used to create on-demand snapshots or to schedule snapshots to occur at specific times. Each snapshot definition can create and store up to eight snapshots. When the ninth snapshot is created, the first snapshot is automatically deleted.

Caution: When you make a snapshot available to other users, all the data in the snapshot is visible, whether or not the other users have permission to view this data directly in Microsoft Dynamics CRM. Make sure you don't share information that other users do not have permission to view.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select a report.
3. On the **More Actions** menu, click **Schedule Report** and complete the steps in the wizard.

Tips

- After you create a snapshot definition, rename the snapshot definition so that users can easily understand the purpose of the snapshot.
  1.
  2. In the **Name** box, enter a new name, and then click **Save and Close**.
- After you have created snapshots, if you don't want users to be able to run the base report:
  1. In the Reports area, select the report.
  2. On the Actions toolbar, click **Edit Report** .
  3. On the **Actions** menu, click **Revert to Personal Report**.

Make a report available to all Microsoft Dynamics CRM users

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report you created, and on the Actions toolbar, click **Edit Report**.
3. On the **Actions** menu, click **Make Report Available to Organization**.

Note

To revert a report back to a personal report, on the **Actions** menu, click **Revert to Personal Report**.

Create, edit, or copy a report using the Report Wizard

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

▸ How to determine which record types have the data you need

There is one record type for each type of data, such as accounts, contacts, or services.

In addition, there are separate record types for:

- Notes. Every note and attachment is stored as a separate record in the Notes record type.
- Close activities. Whenever you close an opportunity, quote or order, an activity is created that tracks the reason for closing the record. These are stored respectively in the Opportunity Close Activity, Quote Close Activity, and Order Close Activity record types. When you close a case, the data is stored in the Case Resolution Activity.

If your report includes data from communication activities, you have two options:

- If you want data about multiple types of communication activities in one report such as the activity subjects and due dates for all types of activities, use the Activity record type.
- If you need specific information about a specific type of activity, such as the recipients, use the Task, E-mail Message, Fax, Appointment, Letter, or Phone Call record type.

Tip:

- While you are creating your report, keep a window open showing a record from the data type you are including in your report. It will help you determine which columns to include.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. To add a new report, click **New**, and then click **Report Wizard**.

   – OR –

   To edit an existing Report Wizard report, select the report, on the Actions toolbar, click **Edit Report** , and then click **Report Wizard**.
   You can only use the Report Wizard to edit reports that were created with the wizard.

3. Select a starting point for your report.
   a. To create a new report, select **Start a new report**.

      – OR –

      To start from a copy of an existing report, select **Start from an existing report**, select the report, and also clear the **Overwrite existing report** check box.

– OR –

To edit an existing report, select **Start from an existing report**, select the report, and check the **Overwrite existing report** check box.

b. If multiple languages are installed, select the language to use for column names, record types, and wizard-generated text in the report.

c. Click **Next**.

4. Enter the name of the report, and specify which record types the report will use.

The purpose of this step is to identify where the data in the report comes from. You can include data from one or two record types, plus data from related records.

a. Enter data in each field:

- **Report name**. This value will be displayed on the **Reports** menu and in the Reports area.
- **Primary record type**. Data from all fields in this record type and related record types will be available when you are defining criteria for which records to include. Data from this record type will be available when you are selecting fields to display.
- **Related record type**. If you need to display data from a related record type, select an additional record type here.

  Tip: If you don't need data from a related record type, don't select one, as it makes the report take longer to load.

b. Click **Next**.

5. Specify which records to include.

The purpose of this step is to determine which records are included in your report. This information is saved as the default filter for the report.

You can select criteria based on the selected record types or on columns from related records.

a. To include only records defined by an existing system view or saved view, select a view.

– OR –

To define which records to include by selecting criteria:

- To add a criteria row:
  1. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
  2. Click the query relational operator, and select an operator.
  3. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
- To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped.

However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.

a. For each row you want to group, click the **Select Row** button ▼ for that row, and then click **Select Row**.

b. On the Filter toolbar, select **Group AND** or **Group OR**.

c. To remove a row from a group, click the **Options menu** button ▼ for that row, and then click **Delete**.

d. To select a group, click the **Options menu** button ▼ for that group, and then click **Select Group**.

e. To add a criteria clause to a group, click the **Options menu** button ▼ for that group, click **Add Clause**, and then select the field, query relational operator, and value.

f. To unselect a group that has been previously selected, click the **Options menu** button ▼ for that group, and then click **Deselect Group**.

g. To ungroup a group, click the **Options menu** button ▼ for that group, and then click **Ungroup**.

h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button ▼ for that group, and then click **Change to OR** or **Change to AND**.

Click **Next**.

Organize and lay out your data.

The purpose of this step is to determine which columns to include, the order in which they are displayed, and whether to group data into subcategories. At a minimum, a report just includes columns. By grouping and summarizing the data, you make it easier to see the patterns.

For example, your report could use one level of grouping to group opportunities by salesperson, or add a second level of grouping to show each quarter's opportunities, or add a third level to show the percentage won and lost in each quarter.

To use a chart in your report, if your report has no grouping, you must select at least one numeric column. If your report uses grouping, you must select at least one numeric column with a summary type defined.

Define how to organize the report:

To group items so that they are organized together in the report by date or other common properties:

0. For each grouping level you need, click **Click here to add a grouping**.
1. Define the grouping:

- **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
- **Column**. The name of the Microsoft Dynamics CRM field that contains the data to define the grouping.
- **Time interval**. For datetime fields, group the data by Month, Day, Week, or Year.
- **Sort order**. Sort order for displaying the groups.

- **Column width**. Width of the column heading in pixels.
- **Summary type**. You can group records by a count of matching records.

2. To reorder the grouping levels, use the up and down arrows in the **Common Tasks** section.
3. Click **OK**.

To define the sort order within each group, click **Configure Sorting**, select a column and sort order, and then click **OK**.

To limit reports to groups with the highest or lowest values, click **Set Top or Bottom Number**:

0. Select **Top** or **Bottom**.
1. Select the number of groups to display.
2. Click **OK**.

Define which columns to display in the report. You can display columns that show data from a record, or columns that show summary information:

0. For each column you want to include, click **Click here to add a column**:
    - **Record type**. You can select records from the primary record type you selected, and from any related record types. If you selected a secondary record type, you can also select records from the secondary record type and its related records types.
    - **Column**. The name of the Microsoft Dynamics CRM field that contains the data to display or summarize.
    - **Data type**. The data type of the column, one of: primarykey, nvarchar, picklist, bit, decimal, int, float, money, ntext, datetime, owner, lookup.
    - **Name**. The name used in the database.
    - **Column width**. The width in pixels of the column.
    - **Summary type**. The specific type of summaries available depends on the data type of the column.
        - **None**: lookup, datetime, owner, picklist, bit, ntext
        - **Average**, **Maximum**, **Minimum**, **Percent of Total**, **Sum**: all numeric record types (decimal, int, float, money)
    - Use the left and right arrows to reorganize the columns.
1. Click **OK**.

Click **Next**.

Select whether to use a chart in the report.

The purpose of this step is to determine whether to use a chart, and which type of chart to use.

Select whether to include a chart:

- **Table only**. This provides a table grouped and sorted as you specified.
- **Chart and table**. Displays both a chart and table.
    - **Show table below the chart on same page**. Clicking on the chart does nothing.

- **Show chart. To view data for a chart region, click the chart region**. Clicking on an area in the chart will display a table with details for that section of the chart.

Click **Next**.

If the report includes a chart, format the chart.

The purpose of this step is to specify the type of chart, and how the data is displayed in the chart.

Select the chart type, and then click **Next**.
The **Chart preview** area shows how the data will be displayed.

- For vertical and horizontal bar charts and line charts, specify which data to display on each axis:
  - In the **Format Column (X) Axis** section, select the field to use for the X axis, and the label that is displayed on the chart for the field.
  - In the **Format Value (Y) Axis** section, you can select two fields. For each field, you can specify the label that is displayed on the chart.
  - In the **Format Labels and Legends** section, specify whether or not to show the data labels and a legend.
- For pie charts, specify the slices and values for the chart.
  - For slices, you must select one of the groupings in your report.
  - For values, you must select a numeric column with a summary type.

Click **Next**.

Review the summary of the report, click **Next**, and then click **Finish**.

Determine where the report can be run from.

When you finish defining the report, you return to the Report form, where you can update the name and description of the report, and determine where the report is displayed:

- **Categories**

  To specify the categories in which to include this report, click the **Select Values** button , and then select the categories. More information: System Settings Dialog Box - Reporting Tab

  By default, a new report is not put into any category. If you want the report to be included in the category views in the Reports area, such as the **Marketing Reports** view, add a category in the **Categories** box.

- **Related Record Types**
  To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button , and then select record types.
  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

- **Display In**

  To specify where reports should be visible, click the **Select Values** button , and then select one or more options:

  - **Reports area**
    Report will be displayed in the Reports area.

- **Forms for related record types**
  Report will be displayed on the form for the record type you select in **Related Record Types**
- **Lists for related record types**
  Report will be displayed from specified list view pages.

If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**
  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that language in their personal options. To make this report available to all users, select **All Languages**.
  Note that this does not change the language used inside the report.

Tip: If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Test the report, and modify it if needed.

On the Report toolbar, click **Run Report** .
If the report needs modifications, start with step 2 and edit the existing report.

Determine who can use the report. By default, the report is a personal report. This means that you are the only one who can use it.

- To share this report with other users, in the Reports area, select the report, and then on the **More Actions** menu, click **Sharing**.
- To make this report available to everyone in the organization, in the Reports area, select the report, on the Actions toolbar menu, click **Edit Report**, and then on the **Actions** menu, click **Make Report Available to Organization**.

If you use the Microsoft Dynamics CRM for Outlook with Offline Access, by default all reports that you own will be available when you are offline. More information: Work with Data to Take Offline

Note

Make a report available for external use

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

Publishing a report for external use makes it available for use in a Microsoft SharePoint Web part or in a custom program, and enables you to work with the report using Microsoft SQL Server Reporting Services.

1. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
2. Select the report, and on the Actions toolbar, click **Edit Report** .
3. On the **Actions** menu, click **Publish Report For External Use**.

Write a Report Using Report-Writing Tools

You can use any ODBC-compliant application to read data directly from the Microsoft Dynamics CRM database. When possible, using built-in reporting tools is easier than using the steps in this procedure. Recommended alternatives:

- Export Data to Excel
- Create Customer-Ready Documents and Messages
- Create, Edit, or Copy a Report Using the Report Wizard

Edit a default report or create a Reporting Services report

▸ Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Report Permissions

The default reports in Microsoft Dynamics CRM are all Reporting Services reports. Default reports cannot be edited with the Report Wizard. To edit the default reports or create a new Reporting Services report other than one created by using the Report Wizard, you need a report development environment:

▸ How to set up a report development environment

Install the required components on your computer:

- Microsoft Visual Studio, or any product that uses the Visual Studio.NET integrated development environment (such as Microsoft Visual Basic.NET).
- Reporting Services Report Designer
  Reporting Services Report Designer 2005 can be installed from the Microsoft SQL Server 2005 CD, and requires Visual Studio.NET 2005.
- Make sure a security role assigned to your account includes the Publish Reports and Add Reporting Services Reports privileges.

In addition to the required components, the following documentation is helpful:

- *Report Writers Guide* section of the *Microsoft CRM 4.0 Software Development Kit*. More information: Writing Reporting Services Reports (Microsoft Dynamics CRM SDK)
- *Reporting Services Books Online* provides help for Reporting Services. More information: SQL Server 2005 Reporting Services Books Online

1. Identify the existing report that is closest in design to your new report.
2. Download the report from Microsoft Dynamics CRM to a computer that is set up with the report development environment.
   a. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
   b. On the Actions toolbar, click **Edit Report** , and then on the **Actions** menu, click **Download Report**.
   c. Click **Save**, and specify the location in which to save the file. If you are creating a new report rather than modifying a report, rename the file.
   d. In the **Download Complete** dialog box, click **Close**.
3. In a product using the Visual Studio integrated development environment (IDE), open the report, and make the required changes.
   If you are making major changes, first read Writing Reporting Services Reports (Microsoft Dynamics CRM SDK).
4. Add the report to Microsoft Dynamics CRM.

a. In the Microsoft Dynamics CRM Reports area, click **New**.

b. In the **Report Type** box, select **Existing File**.

c. In the **File Location** box, enter the path and file name of the dynamic or static file to add, or click **Browse** to locate the file.

d. Edit the report properties:

- **Name**

  The name for the report that is shown in the Reports area and on the **Reports** menu in forms and lists.

- **Description**

  The description that is displayed in the Reports area.

- **Parent Report**

  If this report is a sub-report or a drill-through report, specify an existing parent report. If this is not specified, the parent report will display a "Report not found" error.

- **Categories**

  To specify the categories in which to include this report, click the **Select Values** button, and then select the categories. More information: System Settings Dialog Box - Reporting Tab

- **Related Record Types**

  To have the report appear in the **Reports** list on a page for specific record types, click the **Select Values** button, and then select record types.
  For example, if your new report includes data from accounts and activities, select **Accounts** and **Activities**.

- **Display In**

  To specify where reports should be visible, click the **Select Values** button, and then select one or more options:

  - **Reports area**

    Report will be displayed in the Reports area.

  - **Forms for related record types**

    Report will be displayed on the form for the record type you select in **Related Record Types**

    If the report is enabled for pre-filtering, from the record, users can specify running the report on the current record.

  - **Lists for related record types**

    Report will be displayed from specified list view pages.

    If the report has pre-filtering enabled, from the list view, users can specify running the report on selected records.

- If no values are selected, the report will not be visible to end-users. To view or manage reports not visible to end-users, in the Reports area, select the **All Reports, Including Sub-Reports** view.

- **Languages**

  If your Microsoft Dynamics CRM implementation has multiple languages enabled, specify a language. The report will be displayed for all users who have selected that

language in their personal options. To make this report available to all users, select **All Languages**.
Note that this does not change the language used inside the report.

e. Click **Save**.

f. To modify the filter for the report, on the Actions toolbar, click **More Actions**, and then click **Edit Default Filter**.

Tips

- To share your new file with other users, do one of the following:
  - Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
  - If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
  - Put the report in a shared file system.
  - E-mail the report to other Microsoft Dynamics CRM users in the same domain.
- If you don't want users to run the base report you started from:
  1. In the Reports area, select the report.
  2. On the Actions toolbar, click **Edit Report** .
  3. On the **Actions** menu, click **Revert to Personal Report**.

Use Microsoft Office Word 2003

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

There are several ways you can merge Microsoft Dynamics CRM data into Microsoft Office Word 2003. If you use Microsoft Office Word 2007, you can also use mail merge from Microsoft Dynamics CRM and from Microsoft Dynamics CRM for Outlook.

- Export a list, such as the results of an Advanced Find search, into a dynamic or static Microsoft Office Excel file, and use the Excel file as the data source for a Microsoft Office Word 2003 mail merge. This does not create a Microsoft Dynamics CRM activity for each merged record. More information: Export Data to Excel
- From Microsoft Office Word 2003, read data directly from the Microsoft Dynamics CRM database. This does not create a Microsoft Dynamics CRM activity for each merged record. This method is described in this topic.

1. In Microsoft Office Word, on the **Tools** menu, point to **Letters and Mailings**, and then click **Mail Merge**.
   Follow the instructions in steps 1 and 2 of the **Mail Merge** pane.
2. In step 3 of the **Mail Merge** instructions, select **Use an existing list**, and then click **Browse**.
3. Click **New SQL Server connection.odc**, and then click **Open**.
4. In the **Server Name** box, type the name of the server where the Microsoft Dynamics CRM database is stored, and then click **Next**.
5. In the database list, select the *Organization*_**MSCRM** database.
6. In the **Name** column, select a filtered view that starts with the prefix **Filtered**.
7. Click **Next**, and then click **Finish**.
8. Complete the mail merge by following the remaining steps in the Microsoft Office Word **Mail Merge** pane.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
  1. In the Microsoft Dynamics CRM Reports area, select the report.
  2. Click **Edit Report** .
  3. On the **Actions** menu, click **Make Report Available to Organization**.
- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Use Microsoft Office Word 2007

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

There are several ways you can merge Microsoft Dynamics CRM data into Microsoft Office Word 2007.

- From a list of records such as the results of an Advanced Find search, use mail merge to merge the data into Word 2007. You can create letters or e-mail activities for each record in the list. More information: Create Customer-Ready Documents and Messages
- From Microsoft Dynamics CRM for Outlook, mail merge data from a list. You can create letters or e-mail activities for each record in the list. More information: Create Customer-Ready Documents and Messages
- Export a list, such as the results of an Advanced Find search, into a dynamic or static Microsoft Office Excel file, and use the Excel file as the data source for a Microsoft Office Word 2007 mail merge. This does not create a Microsoft Dynamics CRM activity for each merged record. More information: Export Data to Excel
- From Word, read data directly from the Microsoft Dynamics CRM database. This does not create a Microsoft Dynamics CRM activity for each merged record. This method is described in this topic.

1. In Word 2007, on the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.
2. Click **Step by Step Mail Merge Wizard**.
3. Follow the instructions in steps 1 and 2 of the **Mail Merge** pane.
4. In step 3 of the **Mail Merge** instructions, select **Use an existing list**, and then click **Browse**.
5. Click **New SQL Server Connection.odc**, and then click **Open**.
6. In the **Server name** box, type the name of the server where the Microsoft Dynamics CRM database is stored, and then click **Next**.
7. In the database list, select the *Organization*_**MSCRM** database.
8. In the **Name** column, select a filtered view that starts with the prefix **Filtered**.
9. Click **Next**, and then click **Finish**.
10. Complete the mail merge by following the remaining steps in the Microsoft Office Word **Mail Merge** pane.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .

3. On the **Actions** menu, click **Make Report Available to Organization**.

- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Use Microsoft Office Excel 2003

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. To create a PivotTable, in Excel 2003, on the **Data** menu, click **PivotTable and PivotChart Report**.

   – OR –

   To create a worksheet, in Excel 2003, on the **Data** menu, click **Import External Data**, and then click **New Database Query**.

2. Create a new data source for the Microsoft Dynamics CRM database, or if you already have a data source set up that connects to the Microsoft Dynamics CRM database, connect to it.

   - To create a new data source:
     a. If you are creating a data source for a PivotTable, in the **PivotTable and PivotChart Wizard - Step 1 of 3** dialog box, select **External Data Source**, click **Next**, and then click **Get Data**.
     b. In the **Choose Data Source** dialog box, select **<New Data Source>**, and then click **OK**.
     c. In the **Create New Data Source** dialog box, type a name for the data source, and then in the driver list, select **SQL Server**.
     d. Click **Connect**.
     e. In the **SQL Server Login** dialog box, in the **Server** list, select the Microsoft SQL Server or server instance where the Microsoft Dynamics CRM database is installed, and then click **Options**.
     f. In the **Database** box, select *Organization*_**MSCRM**, and then click **OK** three times. The **Query Wizard** dialog box opens.
   - To connect to an existing data source that uses the Microsoft Dynamics CRM database:
     a. If you are creating a data source for a PivotTable, in the **PivotTable and PivotChart Wizard - Step 1 of 3** dialog box, select **External Data Source**, click **Next**, and then click **Get Data**.
     b. Select an existing data source that uses the Microsoft Dynamics CRM database, and then click **OK**.

3. In the **Query Wizard Available tables and columns list** dialog box, select filtered views that start with the prefix **Filtered**. You can select columns within each filtered view, and select multiple filtered views.

   Caution To integrate with built-in security, only include filtered views in your query. If you connect directly to a database table, the spreadsheet may fail to return data for other users.

4. Continue with the Query Wizard. For more information about the Query Wizard, click the **Help** button to open Microsoft Query Help. For more information about importing external data to Excel, search for "import external data" in Excel Help.
5. For PivotTables, in the **PivotTable and PivotChart Wizard - Step 2 of 3** dialog box, click **Next**, and then click **Finish**. Then drag the fields as needed to your PivotTable.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Use Microsoft Office Excel 2007

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. In Excel 2007, on the **Data** tab, in the **Get External Data** group, click **From Other Sources**, and then click **From Microsoft Query**.
2. In the **Choose Data Source** dialog box, select **<New Data Source>**, and then click **OK**.
3. In the **Create New Data Source** dialog box, type a name for the data source, and then in the driver list, select **SQL Server**.
4. Click **Connect**.
5. In the **SQL Server Login** dialog box, in the **Server** list, select the Microsoft SQL Server or server instance where the Microsoft Dynamics CRM database is installed, and then click **Options**.
6. In the **Database** box, select *Organization*_**MSCRM**, and then click **OK** three times.
   The **Query Wizard - Choose Columns** dialog box opens.
7. In the **Query Wizard - Choose Columns** dialog box, select filtered views that start with the prefix **Filtered**. You can select columns within each filtered view, and select multiple filtered views.

   Caution To integrate with built-in security, only include filtered views in your query. If you connect directly to a database table, the spreadsheet may fail to return data for other users.

8. Continue with the Query Wizard. For more information about the Query Wizard, click the **Help** button to open Microsoft Query Help. For more information about importing external data to Excel, search for "import external data" in Excel Help.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Use another report-writing tool

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Report Permissions

1. Read the online Help for the application that you are using to determine how to read external data from a Microsoft SQL Server database.
2. When selecting the data source, choose the SQL Server instance used by Microsoft Dynamics CRM and the *Organization*_**MSCRM** database.
3. Select filtered views that start with the prefix **Filtered** and any fields from the filtered views that you want in your report.

Tip

To share your new file with other users, do one of the following:

- Add your file as a report in Microsoft Dynamics CRM, and select the report. On the **More Actions** menu, click **Sharing**, and specify users with whom to share the report.
- If the report would be useful for all users, add your file as a report in Microsoft Dynamics CRM, and ask your system administrator to make it available to the organization. If you have the appropriate permissions:
    1. In the Microsoft Dynamics CRM Reports area, select the report.
    2. Click **Edit Report** .
    3. On the **Actions** menu, click **Make Report Available to Organization**.
- Put the report in a shared file system.
- E-mail the report to other Microsoft Dynamics CRM users in the same domain.

Using the Knowledge Base

Using Articles in the Knowledge Base

The knowledge base is a repository of an organization's information. This information is stored as articles, and is organized by subject. It can contain many different types of articles, such as:

- Frequently Asked Questions (FAQs)
- Common problems and their solutions
- Schematics
- Product user guides
- Data sheets
- Release schedules

The knowledge base should include anything that would provide customer service representatives (CSRs) with the information that they need to answer questions about a product or service. CSRs can link an article to a case to track what information was given to the customer. Microsoft Dynamics CRM provides the tools and templates to create, edit, and publish browser-based content about your organization's products and services.

Articles cannot be viewed in Microsoft Dynamics CRM for Microsoft Office Outlook when offline.

Finding Articles

In the knowledge base area, you can either browse the list of articles in the article queue or the subject tree. You can use the **Search** tab to create a search query with specific criteria. Search can return exact matches as well as possible matches. You can perform a full-text search to find specific references, or a keyword search to find articles by alternate terminology. You can search by title or article number.

To improve your search results, you can add keywords to associate alternate terms to an article. For example, an article about fixing a bike tire might have the keywords *patch, mend,* and *tube*. Even if these exact words do not appear in the article itself, the search identifies and returns the article in the result set based on the keywords.

You can also use Advanced Find anywhere in Microsoft Dynamics CRM to search for articles.

Sending Articles

CSRs can send articles directly to customers or to each other through e-mail, either from a case, or from any open e-mail activity. For example, if there is an article that describes how to adjust a part, the CSR can send the article to the customer. The e-mail is recorded as an an e-mail activity.

Work with Published Articles

You can search or browse the knowledge base for published articles, view articles, print articles, or e-mail articles to customers. More information: Work with Articles

Find an article in the Knowledge Base

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

Search results do not include unpublished articles.

1. In the Navigation Pane, click **Service**, and then click **Knowledge Base**.
2. In the **Search** list, in the list, select a type of search.
   - **Full Text Search**
     This search looks through all of the words in all published articles to find articles that match your search criteria.
   - **Keyword Search**
     This search compares your search criteria with alternate terminology assigned to an article to find articles. For example, an article about bicycles might use keywords such as "bike,""cycle," or "trike."
   - **Title Search**
     This search look at the title of all published articles to find articles that match your search criteria.
   - **Article Number Search**
     This search looks for the number that is assigned to the article when it is published. If you know the article number, this is the fastest way to find a specific article.
3. In the **Search for** box, type a word, phrase, keyword, or article number.
4. To narrow your search by subject, locate and select a subject. You can click the **Lookup** button to search for a subject. If you want to search the entire database, do not select a subject.
5. In the **Options** list, select **Exact Text** to search for the exact words that you enter in the **Search for** box, or select **Use Like Words** to search for similar words. For example, if you enter "run," the search would include "running" and "runs."
6. Click **Search** to perform the search.
   The articles that match your criteria are displayed in the right pane. Double-click an article to open it.

Important

When you add a new article or comment to the knowledge base, you cannot search for it until the catalog index is updated. Microsoft Dynamics CRM updates the catalog index automatically every 15 minutes.

Notes

- If you want to view the article queues, in the **Search** list, select **Article Queues**, and then select the queue.
- If you want to browse the subject tree for articles, in the **Search** list, select **Subject Browse**. When you expand the subject tree, the related articles appear in the right pane.
- You can also view articles in the **Workplace** area, under **My Work**.

View unpublished articles

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Service Permissions

1. In the Navigation Pane, click **Service**, and then click **Knowledge Base**.
2. In the **Knowledge Base** area, you can do any of the following:
   - View a list of articles.
     The list of articles is displayed in the right pane.
   - Sort the articles.
     In the list of articles, click a heading to sort by that column. For example, to sort by title, click **Title**. To reverse the sort order, click the column heading a second time.
   -

View an article and comments.

a. On the **Article Queues** tab, click the **Draft**, **Unapproved**, or **Published** folder, and then open the article with the comments you want to read.

b. In the article form, click the **Comments** tab.

c. In the list, open the comment you want to read or append.

d. When you finish, click **OK** to close the comment.

Important

When you add a new article or comment to the knowledge base, you cannot search for it until the catalog index is updated. Microsoft Dynamics CRM updates the catalog index automatically every 15 minutes. To update the results grid, click the **Refresh** button .

Note

You can also view articles in the **Workplace** area, under **My Work**.

Add or delete a comment

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

You can use comments to collect corrections and additions to an article.

1. In the Navigation Pane, click **Service**, and then click **Knowledge Base**.
2. On the **Article Queues** tab, click the **Draft**, **Unapproved**, or **Published** folder to display the list of articles, and then open the article to which you want to add or delete a comment.

3. Click the **Comments** tab.
4. Add a comment.
    a. On the Actions toolbar, click **New Article Comment**.
    b. In the **Comment on This Article** dialog box, in the **Comment Title** box, type a title for your comment.
    c. In the blank box, type your comment, and then click **OK**.
5. Delete a comment.
    a. In the list of comments, select the comment you want to delete.
    b. On the Actions toolbar, click the **Delete** button , and then click **OK**.
6. Click **Save** or **Save and Close**.

Creating Workflows

Creating and Using Workflows

You can automate business processes by creating workflows and applying them to records or allowing Microsoft Dynamics CRM to apply them automatically. By using workflows to automate your business processes, you can:

- Ensure consistency in how records are handled.
- Ensure consistency in the information that is stored in your organization's Microsoft Dynamics CRM database.
- Allow people in your organization to focus on growing your business instead of performing repetitive tasks.

If you have the System Administrator or System Customizer security role, you have the necessary permissions to create workflows that can affect records throughout your organization's implementation of Microsoft Dynamics CRM. However, even if you do not have one of these security roles, you can still create workflows that affect the records that you own.

Three ways to create workflows

There are three ways that you can add workflows to your implementation of Microsoft Dynamics CRM:

- Create workflows by using the Microsoft Dynamics CRM Web application. You can create workflows and workflow templates in the Settings area.
- Create custom workflows and custom workflow actions by using the information that is available in the *Microsoft Dynamics CRM 4.0 Software Development Kit*. For more information, refer to the *Microsoft Dynamics CRM 4.0 Software Development Kit*.
- Purchase custom workflows or custom workflow actions from third-party vendors who develop solutions that are compatible with Microsoft Dynamics CRM. For more information about how to integrate a third-party workflow or workflow action, contact the vendor.

Creating workflows by using the Web application

There are four basic steps to creating a workflow by using the Web application:

1. Create an empty workflow or use a workflow template to create the workflow.
2. Specify the workflow properties.
3. Add conditions, workflow actions, and other elements that define your workflow logic.
4. Publish the workflow.

Using workflows

You use workflows by either applying an on-demand workflow yourself or by specifying when Microsoft Dynamics CRM should start an automatic workflow for you.

Workflow Lifecycle

If you want to use workflows to automate your business processes, it is important to understand the lifecycle of a workflow, from creation and publication through monitoring the workflow jobs created by the workflow.

Creating workflows

There are four basic steps to creating a workflow by using the Web application:

1. Create an empty workflow or use a workflow template to create the workflow.
2. Specify the workflow properties.
3. Add conditions, workflow actions, and other elements that define your workflow logic.
4. Publish the workflow.

More information:

- Work with Workflows
- Workflow Structure

Publishing workflows

Before you can use the workflow you have created, you must publish it. Publishing a workflow changes its status from Draft to Published. Depending on the type of workflow you created, publishing a workflow also makes it available for use in various contexts:

- If you have created an automatic workflow, the workflow starts to run when the criteria defined in its conditions are met.
- If you have created an on-demand workflow, the workflow becomes available to you and other users from Microsoft Dynamics CRM menus and toolbars.
- If you have created a child workflow, the workflow becomes available to be started from within other workflows.

You can make a single workflow available in any combination of these three contexts.

Monitoring workflow jobs

Whenever the criteria defined in a workflow are met, or you decide to apply an on-demand workflow to a record, Microsoft Dynamics CRM creates a workflow job. By monitoring the workflow jobs created by a workflow, you can check progress and make sure that there have been no problems with the workflow, or its workflow jobs.

Workflow Structure

All workflows in Microsoft Dynamics CRM are a combination of workflow properties and workflow logic. Workflow properties and workflow logic form the structure of each workflow record.

Workflow properties

Workflows include a number of options and settings, called workflow properties that are required as part of any workflow in Microsoft Dynamics CRM.

At a minimum, each workflow requires the following properties:

- **Name.**
- **Entity.** Although a workflow can take action on more than one entity, it is still associated with a single primary entity.
- **Scope.** A workflow's scope determines the records that the workflow can take action on. The scope is limited by the permissions that the workflow's owner has, as well as by the view the owner selects for the scope when they are creating the workflow.
- **Type.** You can select whether the workflow you create is a workflow or workflow template.
- **How automatic workflows are started.** You can specify what events in your Microsoft Dynamics CRM implementation will cause the workflow to take action, such as the creation of a new lead record or a specific change to a case record.
- **Availability.** In addition to workflows that run automatically when certain events occur, you make the workflow available as an on-demand workflow, a child workflow, or both.

Workflow logic

The workflow logic you add to your workflow determines the specific actions that the workflow will take on records.

Workflow logic includes the following elements:

- **Stages.** By adding workflow stages to your workflow logic, you can group the steps in your workflow. Workflow stages make the workflow logic easier to read, and explain the workflow logic. However, stages do not affect the logic or behavior of workflows.

  Workflow stage descriptions appear as headings in system job forms, which display the progress of a workflow job. Stage descriptions can also appear in reports.

  You can use stages to define business processes that your organization uses. For example, one workflow could use stages to describe the opportunity management process for your sales team, while another workflow could define the case resolution process for your customer service representatives.

- **Steps.** Each workflow step you add defines the underlying logic of your workflow. Workflow steps can contain actions, such as creating a new record or sending an e-mail notification, or even other steps. (There is no limit to how deeply you can nest workflow steps.)

  You can add the following types of steps to workflows:

  - Check condition
  - Conditional branch
  - Default action
  - Wait condition
  - Parallel wait branch
  - Custom step

- **Actions.** By adding workflow actions to workflow steps, you define the specific actions you want the workflow to perform.

  You can add the following actions to workflows:

  - Create a record
  - Update a record
  - Assign a record

- Send an e-mail notification
- Start a child workflow
- Change the status of a record
- Stop the current workflow
- Perform a custom workflow action

Work with Workflows

By creating workflows, you can create the business logic necessary to automate some or all of your business processes.

Concepts:

- Start an On-Demand Workflow
- Creating and Using Workflows
- Workflow Lifecycle
- Workflow Structure
- Monitoring and Managing Workflows

Create or edit a workflow

Can I do this task?

This task requires the System Administrator or System Customizer security role or equivalent permissions. Customization tasks can be performed only while you are online. More information: Customization Permissions

1. In the Navigation Pane, click **Settings**, and then click **Workflows**.
2. On the Actions toolbar, click **New**.
3. In the **Create Workflow** dialog box, set required properties for the workflow.
    a. In the **Workflow name** box, type the name that you want to use for this workflow.
    b. From the **Entity** list, select the primary entity that you want to use with this workflow.
    c. In the **Type** area, select whether you want to create a completely new workflow or whether you want to use a workflow template.

    If you want to view details about the workflow template, select the workflow template and click **Properties**.

    d. Click **OK**.
4. In the Workflow Properties area in the top half of the **Workflow** form, set additional properties for the workflow.
    a. If you plan to publish this workflow to automate your business processes, from the **Publish As** list, select **Workflow**.

    – OR –

    If you plan to publish this workflow as a workflow template, from the **Publish As** list, select **Workflow Template**.

b. Under **Available to Run**, select how you want to make the workflow available to other users in your organization:

- **On demand**. If you want to make the workflow available as an on-demand workflow, select this check box.
- **As a child workflow**. If you want to make the workflow available as a child workflow, select this check box.

c. If you are creating an automatic workflow, under **Options for Automatic Workflows**, set options unique to workflows that run automatically:

- **Scope**. Select the access level that matches the workflow scope that you want to set for this workflow.

  Note: The items available to you in this list depend on the privileges that have been assigned to your security role for the workflow's primary entity.

- **Start when**. Select the check boxes that correspond to the events in your implementation of Microsoft Dynamics CRM that you want to start the workflow.

  Note: If you select the **Record attributes change** check box, you must click **Select** and specify the attributes of the primary entity that you want the workflow to monitor for changes.

5. Add stages to your workflow logic.

In the Workflow Logic area in the lower half of the **Workflow** form, you can add workflow stages to your workflow logic.

a. Select the line in your workflow logic where you want to add the workflow stage.

b. On the Workflow Logic toolbar, click **Add Step** and select **Stage**.

c. Click **OK**.

d. Click **Type a stage description here** and replace the default text with a description of what your workflow stage includes.

Note: If you want to add more stages to your workflow, first click the area to the left of the existing workflow stage. Next, click the **Insert** menu and select whether you want to add the stage above or below the one you selected. Click **Add Step**, select **Stage**, and click **OK**.

6. Add steps to your workflow logic.

In the Workflow Logic area in the lower half of the **Workflow** form, you can add workflow steps to your workflow logic.

Tip: You can repeat these steps to add whatever steps you want to include in your workflow logic.

a. Select the line in your workflow logic where you want to add the workflow step.

b. On the Workflow Logic toolbar, click **Add Step** and select one of the following items:

- **Check Condition**. Adds a check condition to the workflow. You can add a check condition at any level in your workflow logic.

  After you have added a check condition to your workflow, you can add one or more conditional branches and a default action to the check condition:

- **Conditional Branch**. Adds a conditional branch to the workflow. To add a conditional branch, you must select the **If** line in a check condition or the **Otherwise, if** line in another conditional branch.

  Note that more than six levels of conditional branching are not displayed.

- **Default Action**. Adds a default action to the workflow. You can include only one default action associated with a check condition. To add a default action, you must select the **If** line in a check condition or the **Otherwise, if** line in a conditional branch.

- **Wait Condition**. Adds a wait condition to the workflow. You can add a wait condition at any level in your workflow logic.

  After you have added a wait condition to your workflow, you can add one or more parallel wait branches to the wait condition:

  - **Parallel Wait Branch**. Adds a parallel wait branch to the workflow. To add a parallel wait branch, you must select the **Wait until** line in a wait condition or the **Otherwise, wait until** line in another parallel wait branch.

c. Click **<condition>**.

d. In the **Specify Workflow Condition** dialog box, select the condition for the workflow step:

   Tip: After you specify one condition, move your cursor over the area to the right of the condition you just specified. New fields appear, in which you can specify additional details about the condition.

   i. In the first list, select a primary entity or related entity.

   ii. In the second list, select an attribute in the entity you selected in the previous step.

   iii. In the third list, select the logical operator that best fits the condition you want to specify, such as **Contains** or **Equals**.

   iv. In the last lists or boxes, enter the value that you want to use as the criteria for your workflow condition.

   v. Click **Save and Close**.

   Tip: You can specify multiple conditions for a single workflow step. After you select an entity from the first column, a second line appears, where you can specify another condition. The workflow considers the conditions to have been met only when an event matches all of the criteria.

   On the **Workflow** form, click **Type a step description here** and replace the default text with a description of what your workflow step includes.

   Add actions to your workflow logic.

In the Workflow Logic area in the lower half of the **Workflow** form, you can add workflow actions to your workflow logic.

Tip: You can repeat these steps to add whatever actions you want to include in your workflow logic.

Select the line in your workflow logic where you want to add an action.

On the Workflow Logic toolbar, click **Add Step** and select one of the following items:

- **Create Record**. Creates a new record. From the **Create** list, select the entity for which you want to create individual records.

- **Update Record**. Updates a record. From the **Update** list, select the record that you want to update.
- **Assign Record**. Assigns a record from one user to another user. From the **Assign** list, select the record that you want to reassign, and then click the **Lookup** button and select the user you want to assign the record to.
- **Send E-mail**. Sends an e-mail notification. From the **Send e-mail** list, select whether you want to create a new e-mail message or use an E-mail Template.
- **Start Child Workflow**. Starts a child workflow. From the **Start child workflow** list, select the primary entity of the child workflow you want to use, and then click the **Lookup** button and select the child workflow.
- **Change Status**. Changes the status of a record. From the first **Change status** list, select the record that you want to change the status of, and then select the status from the second list.
- **Stop Workflow**. Stops the current workflow. From the **Stop workflow with status of** list, select the status that you want to set for the stopped workflow.

If a **Set Properties** button appears next to the new action you added, click **Set Properties** and specify details about the entity that this step in your workflow is taking action on.

Click **Type a step description here** and replace the default text with a description of what your workflow step includes.

Click **Save** or **Save and Close**.

Note

If you use a wait condition to wait for a timeout, you will no longer be able to change the timeout condition (you can change individual details for the timeout, but you cannot change the timeout to another type of condition). If you need to change the conditions, delete the timeout and add a new wait condition.

Add or change dynamic values in a workflow

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: Customization Permissions

You can use dynamic values in the entities or records that you use in a workflow, as well as in the conditions in your workflow logic.

1. In the Navigation Pane, click **Settings**, and then click **Workflows**.
2. Open the workflow that includes fields where you want to use dynamic values.
3. If you want to add dynamic values to fields in a workflow condition, open the condition that includes the fields.

   – OR –

   If you want to add dynamic values to fields in an entity or record that a workflow action uses, click **Set Properties** for that entity or record.

4. If the **Form Assistant** pane is not displayed, click the **Expand** button .

5. Click the field where you want to insert a dynamic value.
6. Under **Dynamic Values** in the **Form Assistant** pane, from the **Operator** list, select a logical operator.
7. From the first list under **Look for**, select the entity or record that includes the attributes you want to insert as dynamic values.
8. From the second list under **Look for**, select the specific attribute you want to insert, and then click **Add**.
9. If you want Microsoft Dynamics CRM to insert alternative attribute values in cases when the attribute you specified in steps 4 through 6 is empty, repeat these steps to add additional attributes, and then use the **Move Up** and **Move Down** buttons to arrange the attributes in the order that you want Microsoft Dynamics CRM to evaluate them.
10. If you want Microsoft Dynamics CRM to insert static text when none of the attributes you have specified contain any data, in the **Default text** box, type the text that you want Microsoft Dynamics CRM to display instead of a dynamic value.
11. Click **OK**.

    The dynamic values appear as yellow boxes in the field where you inserted them.

12. In the form for the entity, record, or conditions used in your workflow, click **Save and Close**.
13. In the **Workflow** form, click **Save** or **Save and Close**.

Note

You cannot edit dynamic values that you have already inserted in a field. To change a dynamic value, you must remove the old value and add a new one. Select the yellow box in the field for the value you want to change, press the DELETE key on your keyboard, and then add the dynamic value you want to use in its place.

Publish or unpublish a workflow

Can I do this task?

This task requires permissions that are found in all default security roles. Customization tasks can be performed only while you are online. More information: Customization Permissions

Publishing a workflow makes it available to use as an automatic workflow, on-demand workflow, or child workflow. Unpublished workflows that are in a draft state cannot be used.

1. In the Navigation Pane, click **Settings**, and then click **Workflows**.
2. Select the workflow that you want to publish or unpublish.
3. To publish a workflow, on the Actions toolbar, click **Publish**.

   – OR –

   To unpublish a workflow, on the Actions toolbar, click **Unpublish**.

4. In the confirmation message, click **OK**.

Note

You cannot unpublish workflows that have active workflow jobs. Before you unpublish a workflow, check for any active workflow jobs and cancel them. More information: Work with System Jobs

Start an On-Demand Workflow

If you or your organization have created on-demand workflows, you can apply these workflows to records that appear in a list.

Concepts:

- Creating and Using Workflows
- Monitoring and Managing Workflows

Start an on-demand workflow

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Open the list of records that contains the record you want to apply a workflow to, such as leads or cases.
2. Select the record or records that you want to apply a workflow to.
3. On the Actions toolbar, click **Run Workflow**.
4. In the **Look Up Records** dialog box, select the workflow that you want to run, and then click **OK**.
5. In the confirmation message, click **OK**.

Note

The **Run Workflow** button does not appear on the Actions toolbar if no on-demand workflows have been created for the record type that you are viewing.

Communicating with other Microsoft Dynamics CRM Users

Work with Announcements

You can view Announcements in the Workplace area.

View announcements

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Configuration Permissions

- Under **Workplace**, click **Announcements**.

Create or edit an announcement

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Announcements**.
2. On the Actions toolbar, click **New**.
3. On the **Announcement** tab, enter information or observe any noted restrictions or requirements as needed:
   - **Title**
     Enter a title that clearly and unambiguously describes the nature and purpose of the announcement.
   - **Body**
     Enter the entire text of the announcement. You can cut and paste an announcement text from another application. However, any formatting will be lost.
4. Under **Additional Settings**, you can also enter additional information.
   - **More Information URL**
     Enter a Web address path for a Web site with more details related to the announcement. A Web address that does not include "http://" is automatically expanded to a full Web address. In the announcement, the Web address is an active external link.
   - **Expiration Date**
     Enter the expiration date for the announcement, or click the **Select Date** button to select the date.
     When an announcement expires, its expiration date cannot be updated. Microsoft Dynamics CRM removes it from the Announcements area, and you must create a new announcement.
5. Click **Save** or **Save and Close**.

Note

You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005. If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

Work with Integrated Instant Messaging

Work with Integrated Instant Messaging

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

If you have Microsoft Office Communicator 2007, MSN Messenger, or Live Messenger installed, you can send an instant message to any user, contact, or opportunity, or lead in Microsoft Dynamics CRM with an e-mail address and using one of the instant messaging applications listed.

Note You may need to add the Microsoft Dynamics CRM server URL to the list of Internet Explorer trusted sites for the online presence to display. See online Help in Internet Explorer for instructions.

Record types and columns that can display online presence

- Contact records: **Full Name**
- Lead records: **Primary Contact**
- Opportunity records: **Potential Customer**
- All customer records: **Users**
- All customer records: **Owner**
- All customer records: **Modified By**

To access the Communicator menu, click the **Online Presence Jewel** .

- A green jewel indicates the person can receive an instant message and is available.
- A red jewel indicates the person is busy. You can send a message, but they may not respond immediately.
- A yellow jewel indicates the person is away or out of the office.
- A peach jewel indicates the person's online status is unknown. There are other communication methods available from the menu.

Enabling online presence

There are two ways to enable the online presence for a personal view. By adding the associated e-mail address for a user or contact, enables online presence on the related column. For example, adding the owner's e-mail column to a view, enables the presence on the owner column. See the list above.

If you do not want to include the e-mail column, you can also customize the view to enable online presence.

These two example procedures describe how to add a presence to a saved view. If you have the correct permissions, you can also edit a system view for an entity to enable the presence. More information: Work with Views

To add an e-mail column to a saved view

a. In the list view you want to add online presence, click **Advanced Find**.

b. In the **Advanced Find** form, click **Edit Columns**.

c. In **Common Tasks**, click **Add Columns**

d. Select one of the e-mail related checkboxes, for example: **E-mail**.

e. Click **OK** twice.

f. In the **Advanced Find** form, click **Find**.

To save the view, click **Back to Query**, and then on the Actions toolbar, click **Save As**.

To enable the online presence on a column in a saved view

a. In the Accounts or Contacts area, click **Advanced Find**.

b. In the **Advanced Find** form, click **Edit Columns**.

c. Do one of the following:

   a. Select one of the columns that can display online presence, such as **Full Name** and then click **OK**.

   b. Select the column, and then click **Change Properties**.

   c. Select the **Enable Presence for this column** check box, and then click **OK**.

   d. To save your changes and close the dialog box, click **OK**.

   e. In the **Advanced Find** form, click **Find**.

   To save the view, click **Back to Query**, and then on the Actions toolbar, click **Save As**.

Note

You cannot enable presence on columns for related record types, or on deleted columns.

Chapter 2: Sales

This chapter details information about using the sales module in Microsoft Dynamics CRM.

Managing Customer Relationships

Managing Accounts and Contacts

In Microsoft Dynamics CRM, you can manage, share, and collaborate on accounts and contacts within your organization. The logging and tracking features benefit the person who makes the sale, his or her sales team, other supporting teams, and their management. All activities, such as e-mail, phone calls and meetings, are logged and a running history of every activity with the account or contact is kept.

You can enter accounts or contacts individually or you can use Microsoft Dynamics CRM to import lists of these records into the database. You might already have customer records in Microsoft Office Outlook or Microsoft Office Excel that you can import using the Import Data Wizard, and then use the account list or contact list to view or open the records to make sure that all the information is imported successfully.

Deciding between Using Accounts and Contacts

Accounts are companies that you do business with, whereas contacts represent individuals or specific representatives for an account. Therefore, if you have mostly businesses that you sell to, then you will primarily create account records. However, if you typically provide goods or services to individuals, then you will want to create contact records.

Even if you only sell to individuals, you might still find accounts useful for tracking your competitors or vendors. You can have one or more contacts associated with a single account, but only one of the contacts can be designated as the primary contact. You can create and edit accounts or contacts from the Workplace, Sales, Marketing, and Services areas.

You can create a relationship between accounts and contacts, specify the type of relationship between them, and define the relationship role that the account or contact has with regard to the primary record. For example, if you add a contact as a relationship to an account, anyone who views the contact data will see that the individual can influence the purchasing choices of the account.

Adding Sales Transactions

You can start a sales transaction, such as a quote, order, or invoice, from within an account or a contact record. The advantage of starting sales transactions this way is that much of the information is automatically entered based on the account or contact data. You can also view any sales transaction records from within these customer records to track the overall sales process and expected revenue.

Adding Services

You can create a case or contract from within an account or contact record. When you save the record, it is automatically linked to the account or contact. This information provides sales staff with important details about the type of service the customer is entitled to receive.

Managing Customer Records for Campaigns

You can add customer records to marketing lists that already exist as part of your marketing efforts directly from the account or contact form. You can also view related campaign information from within a customer record. In addition, you can use a quick campaign to run an activity for either a selected customer record, a page of customer records, or all customer records for a particular view.

Note

If you are working offline, you can create a relationship between two records and specify details about the relationship. However, you must go online before the changes take effect.

Work with Accounts

Accounts represent companies that your organization may do business with. **Concepts:** Managing Accounts and Contacts

Create or edit an account

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Accounts**.
2. On the Actions toolbar, click **New**, or open the record that you want to edit.
3. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:

- **Account Name**
  You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
- **Account Number**
  You must enter a number of 20 characters or less.
- **Parent Account**

  If the account you are creating is a sub-account, then you will want to set up a relationship to its parent account.

  To locate and select a parent account, click the **Parent Account** box. You can select a record from a filtered list in the **Form Assistant** pane, or you can click the **Lookup** button to search for other records. If you are creating a parent account, leave this field blank.

- **Primary Contact**
  To locate and select a primary contact, click the **Primary Contact** box. You can select a record from a filtered list in the **Form Assistant** pane, or you can click **Lookup** to search for other records.
- **Relationship Type**

  Select an option from the list. This field can be customized, so the values will vary.

  Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

  If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.

- **E-mail**
  E-mail addresses must be valid. For example, **someone@microsoft.com**. Although this field is optional, including an e-mail address allows you to communicate with the account by using e-mail.
- **ZIP/Postal Code**
  Enter a code of 20 characters or fewer. Although this field is optional, including a ZIP Code or

postal code can provide basic geographical information about the account that you can use in other areas of the application, such as reports and workflows.

4. On the **Details** tab, observe any noted restrictions or requirements and enter all the information you have available in the following fields:

- **Territory**

  You can select a record from a filtered list in the **Form Assistant** pane, or you can click **Lookup** to search for other records.

  This field can be customized, so the values will vary. If there are no territories in the list or the territory you want is not listed, contact your system administrator and ask them to add the territory to the **Sales Territories** area, which is located in the **Settings** area.

- **Category**

  Select an option from the list. This field can be customized, so the values will vary.

  The default values are **Preferred Customer** and **Standard**. Your organization might add other values to manage territories.

  These values help determine how to set up territories so that your organization has roughly an equal number of highly rated accounts. It might also reflect the priority of the account.

- **Industry**

  Select an option from the list. This field can be customized, so the values will vary.

  If the account specifies an industry that is not in the list, you can work with your system administrator to get new industries added to the list. This field is used in various reports such as **Account Overview**.

  Another form that includes the industry field is the lead form. If your system administrator adds custom industries to the account form, he or she should also add them to the lead form to keep the two lists in synch.

- **Annual Revenue**
  You must enter numbers between 0.00 and 1,000,000,000.00.
  You can use commas and a decimal point, but you cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).
- **No. of Employees**
  You must enter a whole number between 0 and 1,000,000.
- **SIC Code**
  Indicate the Standard Industrial Classification (SIC) code for this account. You can search on SIC for organizations with a particular code to display all accounts of businesses in that category. Enter a code of 20 characters or fewer.
- **Ownership**
  Select an option that indicates how shares of the company are held. For example, if the company is held publicly, meaning its stock is traded on the open market, then its ownership would be public.
- **Ticker Symbol**
  If you enter a ticker symbol for a market outside the United States, you must prefix it with the country code, for example US:MSFT (*country code:ticker symbol*). This information is available only for markets that are currently listed on the MSN Money Web site. In addition to the United States (US), MSN Money also provides information for markets in Australia (AU),

Belgium (BE), Canada (CA), France (FR), Germany (DE), Great Britain (GB), Italy (IT), Japan (JP), Netherlands (NL), Spain (ES), and Sweden (SE). For more information, go to the MSN Money Web site.

5. On the **Administration** tab, enter information or observe any noted restrictions or requirements as needed:

- **Owner**
  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
- **Originating Lead**

  If this account was the result of converting a lead, then this field will automatically show the lead record. You can also enter the originating lead.

  To locate and select a lead, click the **Originating Lead** box. You can select a record from a filtered list in the **Form Assistant** pane, or you can click **Lookup** to search for a lead.

- **Credit Limit**
  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.
- **Credit Hold**
  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.
- **Payment Terms**
  This field is mapped to any orders that are created for the record.
- **Price List**

  If your organization has price lists set up, you can use **Lookup** to search for and select the appropriate price list.

  This field is mapped to any orders that are created for the record.

- **Contact Methods**
  - **Preferred**
    Select the option that best describes the preferred method of contact.
  - **E-mail**
    If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.
  - **Bulk E-mail**
    If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.
  - **Phone**
    The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.

- **Fax**
  The selected option simply provides information to anyone who views the record.
- **Mail**
  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**
  - **Send Marketing Materials**
    If you select **Yes**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **No**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.
  - **Last Date Included in Campaign**
    Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-spam Setting** area of a Campaign form uses the date in this field to ensure that you do not send frequent mailers to a customer.
- **Service Preferences**
  Select the customer's preferred time and day for appointments.
- Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record.

  You can select a record from a filtered list in the **Form Assistant** pane, or you can click **Lookup** to search for other records.

6. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
7. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Tips

- You can add more addresses to handle various locations for a given account or contact. To do this, under **Details**, click **More Addresses**, and then on the Actions toolbar, click **New Address**.
- When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.
- If you create both accounts and subaccounts, and create relationships between them, then you can use the reporting features to get subtotals or total revenue reports for all the related accounts.

Associate an opportunity with an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selection in the **Opportunity Relationship** dialog box. Therefore, if you want to create an opportunity relationship with the specific account or contact that you open, make sure that you select that record.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record to which you want to add an opportunity relationship.
3. On the **Actions** menu, point to **Add Relationship**, and then click **Opportunity**.
4. In the **Opportunity Relationship** dialog box, enter information in the following boxes:
   - **Opportunity**
     You must select the opportunity that will be associated with the record. Click the **Lookup** button to search for an opportunity.
   - **Customer**
     This field is automatically filled with the account or contact record.
   - **Customer Role**
     Select an option from the list. This field can be customized, so the values will vary.

     Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

     If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
   - **Description**
     Use this field to provide additional information about the relationship.
5. Click **Save** or **Save and Close**.
   Repeat this step to save the account or contact.

Note

You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Set customer preferences for a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You can provide personalized customer service for your customers by recording their preferences regarding services and service times. These preferences become the default criteria the next time that a service activity is scheduled for the customer and they are offered in the **Form Assistant** pane.

1. In the Navigation Pane, click **Workplace**, and then under **Customers**, click either **Accounts** or **Contacts**.
2. In the list, open the record you want.
3. Under **Details**, click **Information**.
4. On the **Administration** tab, under **Service Preferences**, select the customer's preferred time and day for appointments.
5. Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
6. Click **Save** or **Save and Close**.

Add or remove a customer record in a marketing list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. Under **Marketing**, click **Marketing Lists**.
4. On the Actions toolbar, click **Add to Marketing List**.
5. In the **Look Up Records** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
6. Click **Save** or **Save and Close**.

Note

To remove a record from a marketing list, open the customer record you want to remove from the marketing list. On the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Tip

If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Add or remove a customer relationship for an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

In Microsoft Dynamics CRM, you can create relationships between one customer record and one or more other records. These relationships are defined by their relationship role. The relationship that you set up is based on your selection in the **Customer Relationship** dialog box. If you want to create a relationship between the account or contact that you are working with and another specific account or contact, make sure that you select that account or contact.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record to which you want to add a customer relationship.
3. Under **Details**, click **Relationships**, and then on the Actions toolbar, click **New Customer Relationship**.
4. In the **Customer Relationship** dialog box, enter information in the following boxes:
   - **Party 1**

     This field automatically displays the name of the customer that you opened in step 2.

     However, you can also click the **Lookup** button to search for and select a different account or contact record. If you do so, the new relationship you set up will not appear in the customer record you originally opened.

- **Party 2**
  Select the customer record to associate with the **Party 1** record. Click the **Lookup** button to search for an account or contact record.
- **Role 1**
  Select an option from the list. This field can be customized, so the values will vary.

  Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

  If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
- **Description 1**
  Use this field to provide additional information about the relationship.
- **Role 2**

  From the list, select the relationship role that best describes the relationship of **Party 1** to **Party 2**. The same items will appear in both lists.

  For example, if you selected **Supplier** from **Role 1**, you might select **Retailer** from **Role 2**.
- **Description 2**
  Use this field to provide additional information about the relationship.

5. Click **Save** or **Save and Close**.
   Repeat this step to save the account or contact.

Important

You cannot set up duplicate relationships between an account and the same account or contact. It works the same way when setting up a contact relationship. For example, if you create a relationship between a new account and the account, Fabrikam, Inc., and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer and relationship role.

Note

To remove a relationship, open the account or contact, and then under **Details**, click **Relationships**. In the relationships list, click the relationship that you want to delete, and then click the **Delete** button .

Deactivate or activate an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Instead of deleting an account or contact, you can deactivate it and still have an audit trail for your sales process. When an account or contact is deactivated, it cannot be edited, and relationships between the account or contact and other records cannot be created.

The only way to view a deactivated account or contact is to select **Inactive Accounts** or **Inactive Contacts** in the **View** list. If the representative of the account or the individual contact for the record you deactivated contacts you in the future, you have the option of reactivating the account or contact without re-entering all the data.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. Select the account or contact you want to deactivate or activate.
3. On the Actions toolbar, click **More Actions**, and then click one of the following:
   - **Deactivate**

     – OR –

   - **Activate**
4. In the confirmation dialog box, click **OK**.

Note

When you deactivate a record, all relationships created while it was active continue to be available; however, you cannot create new relationships with a deactivated record.

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

From a list of records, including the results of a search You can run a quick campaign from any list of accounts, contacts, or leads.

a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

- **For Selected Records**
  Select this option if you have selected one or more records in the list.
- **For All Records on Current Page**
  Select this option to include all records on the page for the quick campaign activity.
- **For All Records on All Pages**
  Select this option to include all records on all pages for the quick campaign activity.

- From the **Marketing Lists** list You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

  a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
  b. Select the marketing list or marketing lists for which you want to create a quick campaign.
  c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

- From a marketing list You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

  a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
  b. Double-click the marketing list for which you want to create a quick campaign.
  c. On the Actions toolbar, click **Create Quick Campaign**.

4. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

Notes

- You cannot add additional records to a quick campaign after you have created it.
- In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). This choice affects who can see and take action on an activity. For example, if you were creating a phone call activity for all of the sales representatives, you could select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative could then see the activity and take action on it. However, if you were creating a large number of e-mail activities that Microsoft Dynamics CRM would perform automatically, you could assign the e-mail activity to yourself instead of the record owners.
- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.

- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.
- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report
  Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.
- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Work with Contacts

Contacts are people who represent customers or potential customers, or someone related to an account.

Create or edit a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Contacts**.
2. On the Actions toolbar, click **New**, or open the record that you want to edit.
3. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:
   - **First Name**
     If you enter a first name, it can only be a name with a length of 50 characters or fewer. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Last Name**
     You must enter a name with a length of 50 characters or fewer.
   - **Parent Customer**
     If the contact you are creating is a subcontact, then you will want to set up a relationship to its parent contact. If you are setting up a parent customer, leave this field blank. To locate and select a parent customer, click the **Parent Customer** box. You can select a record from a filtered list in the **Form Assistant** pane, or you can click the **Lookup** button to search for other records.
   - **E-mail**
     E-mail addresses must be valid. For example, **someone@microsoft.com**.
   - **ZIP/Postal Code**
     Enter a code of 20 characters or fewer.
4. On the **Details** tab, observe any noted restrictions or requirements and enter all the information you have available in the following fields:
   - **Birthday**
     You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
     If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.
   - **Anniversary**
     You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
     If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For

example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

5. On the **Administration** tab, enter information or observe any noted restrictions or requirements as needed:

- **Owner**
  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
- **Originating Lead**
  If this contact was the result of converting a lead, then this field will automatically show the lead record. You can also enter the originating lead. To locate and select a lead, click the **Originating Lead** box. You can select a record from a filtered list in the **Form Assistant** pane, or you can click **Lookup** to search for a lead.
- **Credit Limit**
  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.
- **Credit Hold**
  This field is not used as part of the business logic in Microsoft Dynamics CRM; however, your organization might use it as part of a workflow process.
- **Payment Terms**
  This field is mapped to any orders that are created for the record.
- **Price List**
  If your organization has price lists set up, you can select a record from a filtered list in the **Form Assistant** pane, or you can click **Lookup** to search for and select the appropriate price list. This field is mapped to any orders that are created for the record.
- **Contact Methods**
  - **Preferred**
    Select the option that best describes the preferred method of contact.
  - **E-mail**
    If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.
  - **Bulk E-mail**
    If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.
  - **Phone**
    The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.
  - **Fax**
    The selected option simply provides information to anyone who views the record.

- **Mail**
  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**
  - **Send Marketing Materials**
    If you select **Yes**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **No**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.
  - **Last Date Included in Campaign**
    Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-spam Setting** area of a Campaign form uses the date in this field to ensure that you do not send frequent mailers to a customer.

- **Service Preferences**

  Select the customer's preferred time and day for service activities.

  Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record.

  You can select a record from a filtered list in the **Form Assistant** pane, or you can click **Lookup** to search for other records.

6. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
7. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Note

After you create contacts, you can associate one or more of them with an account, but only one contact can be the primary contact for an account. If you consolidate both contacts and sub-contacts, and create relationships between them, then you can use the reporting features to get subtotals or total revenue reports for all the related contacts.

Tips

- You can add more addresses to handle various locations for a given account or contact. To do this, under **Details**, click **More Addresses**, and then on the Actions toolbar, click **New Address**.
- When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.
- To add a related record, on the **Actions** menu, point to **Add Related**, and then click the record type you want. Complete the form as needed.

Associate an opportunity with an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selection in the **Opportunity Relationship** dialog box. Therefore, if you want to create an opportunity relationship with the specific account or contact that you open, make sure that you select that record.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record to which you want to add an opportunity relationship.
3. On the **Actions** menu, point to **Add Relationship**, and then click **Opportunity**.
4. In the **Opportunity Relationship** dialog box, enter information in the following boxes:
   - **Opportunity**
     You must select the opportunity that will be associated with the record. Click the **Lookup** button to search for an opportunity.
   - **Customer**
     This field is automatically filled with the account or contact record.
   - **Customer Role**
     Select an option from the list. This field can be customized, so the values will vary.

     Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

     If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
   - **Description**
     Use this field to provide additional information about the relationship.

5. Click **Save** or **Save and Close**.
   Repeat this step to save the account or contact.

Note

You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Set customer preferences for a service activity

▸ Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You can provide personalized customer service for your customers by recording their preferences regarding services and service times. These preferences become the default criteria the next time that a service activity is scheduled for the customer and they are offered in the **Form Assistant** pane.

1. In the Navigation Pane, click **Workplace**, and then under **Customers**, click either **Accounts** or **Contacts**.
2. In the list, open the record you want.
3. Under **Details**, click **Information**.
4. On the **Administration** tab, under **Service Preferences**, select the customer's preferred time and day for appointments.
5. Click the **Preferred Service**, **Preferred Facility/Equipment**, or **Preferred User** box to search for the appropriate record. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
6. Click **Save** or **Save and Close**.

Add or remove a customer record in a marketing list

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. Under **Marketing**, click **Marketing Lists**.
4. On the Actions toolbar, click **Add to Marketing List**.

5. In the **Look Up Records** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
6. Click **Save** or **Save and Close**.

Note

To remove a record from a marketing list, open the customer record you want to remove from the marketing list. On the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Tip

If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Add or remove a customer relationship for an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

In Microsoft Dynamics CRM, you can create relationships between one customer record and one or more other records. These relationships are defined by their relationship role. The relationship that you set up is based on your selection in the **Customer Relationship** dialog box. If you want to create a relationship between the account or contact that you are working with and another specific account or contact, make sure that you select that account or contact.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. In the list of accounts or contacts, open the record to which you want to add a customer relationship.
3. Under **Details**, click **Relationships**, and then on the Actions toolbar, click **New Customer Relationship**.
4. In the **Customer Relationship** dialog box, enter information in the following boxes:
   - **Party 1**

     This field automatically displays the name of the customer that you opened in step 2.

However, you can also click the **Lookup** button to search for and select a different account or contact record. If you do so, the new relationship you set up will not appear in the customer record you originally opened.

- **Party 2**
  Select the customer record to associate with the **Party 1** record. Click the **Lookup** button to search for an account or contact record.
- **Role 1**
  Select an option from the list. This field can be customized, so the values will vary.

  Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

  If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
- **Description 1**
  Use this field to provide additional information about the relationship.
- **Role 2**

  From the list, select the relationship role that best describes the relationship of **Party 1** to **Party 2**. The same items will appear in both lists.

  For example, if you selected **Supplier** from **Role 1**, you might select **Retailer** from **Role 2**.
- **Description 2**
  Use this field to provide additional information about the relationship.

5. Click **Save** or **Save and Close**.
   Repeat this step to save the account or contact.

Important

You cannot set up duplicate relationships between an account and the same account or contact. It works the same way when setting up a contact relationship. For example, if you create a relationship between a new account and the account, Fabrikam, Inc., and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer and relationship role.

Note

To remove a relationship, open the account or contact, and then under **Details**, click **Relationships**. In the relationships list, click the relationship that you want to delete, and then click the **Delete** button .

Deactivate or activate an account or contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Instead of deleting an account or contact, you can deactivate it and still have an audit trail for your sales process. When an account or contact is deactivated, it cannot be edited, and relationships between the account or contact and other records cannot be created.

The only way to view a deactivated account or contact is to select **Inactive Accounts** or **Inactive Contacts** in the **View** list. If the representative of the account or the individual contact for the record you deactivated contacts you in the future, you have the option of reactivating the account or contact without re-entering all the data.

1. In the Navigation Pane, click **Sales**, and then click either **Accounts** or **Contacts**.
2. Select the account or contact you want to deactivate or activate.
3. On the Actions toolbar, click **More Actions**, and then click one of the following:
   - **Deactivate**

     – OR –

   - **Activate**
4. In the confirmation dialog box, click **OK**.

Note

When you deactivate a record, all relationships created while it was active continue to be available; however, you cannot create new relationships with a deactivated record.

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

From a list of records, including the results of a search You can run a quick campaign from any list of accounts, contacts, or leads.

a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

- **For Selected Records**
  Select this option if you have selected one or more records in the list.
- **For All Records on Current Page**
  Select this option to include all records on the page for the quick campaign activity.
- **For All Records on All Pages**
  Select this option to include all records on all pages for the quick campaign activity.

- From the **Marketing Lists** list You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

  a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
  b. Select the marketing list or marketing lists for which you want to create a quick campaign.
  c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

- From a marketing list You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

  a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
  b. Double-click the marketing list for which you want to create a quick campaign.
  c. On the Actions toolbar, click **Create Quick Campaign**.

4. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

Notes

- You cannot add additional records to a quick campaign after you have created it.
- In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). This choice affects who can see and take action on an activity. For example, if you were creating a phone call activity for all of the sales representatives, you could select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative could then see the activity and take action on it. However, if you were creating a large number of e-mail activities that Microsoft Dynamics CRM would perform automatically, you could assign the e-mail activity to yourself instead of the record owners.
- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.
- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Generating New Sales

Managing Leads

In Microsoft Dynamics CRM, you can get lead information in the Sales area. Your organization might refer to leads as inquiries, prospects, or sales opportunities. All activities are logged and a running history of every activity with the lead is kept, once it is completed.

You can enter leads individually. In addition, you can use Microsoft Dynamics CRM to import lead lists into the database, perform the common qualifying activities, and convert leads to opportunities, if they qualify.

Each disqualified lead is retained in the database for business-reporting purposes. For example, you might want to analyze the success of different list sources or assess how much time the sales force spends prospecting leads.

Importing leads is the quickest way to add them to Microsoft Dynamics CRM. You might already have prospects in Microsoft Office Outlook or Microsoft Office Excel that you can import using the Import Data Wizard, and then use the leads list to view or open leads to ensure that all the information imported successfully.

You can track information about prospective customers, and then qualify and assign inquiries. Because leads are tracked separately from customers throughout the sales cycle, you can focus on building your customer base.

Understanding How Accounts, Contacts, Leads, and Opportunities Relate

Account and contact records represent established customers. Leads are potential or prospective customers. Opportunities are not a specific customer, such as a lead, contact, or account, and therefore require a customer record to be added to the opportunity.

How you can use lead, opportunity, contact and account records to facilitate the process of generating new customers is described in the following scenario:

A Sales and Marketing team uses methods to gather leads. For example, the sales and marketing team holds a seminar and gathers business cards from participants. Personal names, businesses names, addresses, and phone numbers are gathered from the seminar and then entered into Microsoft Dynamics CRM as lead records. The lead records are assigned to the sales staff based on certain criteria, such as the lead's ZIP Code/Postal Code.

Next, sales staff contact the leads to qualify them. The salesperson may initiate a telephone call to the lead and ask questions such as "Are you interested in purchasing our products?" and "When do you intend to purchase?"

Based on the information collected from the previous lead qualification process, the salesperson uses Microsoft Dynamics CRM to either disqualify the lead or convert the lead into three new records in Microsoft Dynamics CRM:

- An account for the business
- A contact for the person who the sales staff is working with
- An opportunity for the potential sale

The contact that is created has the account configured as the parent account.

Work with Leads

Leads represent potential customers who have not yet been qualified by your sales process. As you qualify leads, you can convert them to other types of records.

Create or edit a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When you create a lead, you might be tempted to only enter the system-required fields (marked with asterisks **Business-required** symbol *) or business-recommended fields (marked with plus signs **Business-recommended** symbol +) ; however, the more data you collect and enter into this form, the more likely you are to turn those leads into business opportunities. Remember that e-mail addresses, the source of the lead, and specific product interests are key factors in helping your sales staff complete the necessary follow-up.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. On the Actions toolbar, click **New**, or open the record that you want to edit.
3. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:

   - **Topic**
     This information should reflect what the lead is interested in. For example, if a potential customer calls and asks for details on a product, list the name of the product here.
   - **First Name**
     If you enter a first name, it can only be a name with a length of 50 characters or fewer. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Last Name**
     You must enter a name with a length of 50 characters or fewer.
   - **Company Name**
     You must enter a name with a length of 100 characters or fewer.

   In the **Contact Information** area, enter all the contact information you have available for this lead because this information will assist a salesperson in making future contacts. E-mail addresses must be valid. For example, **someone@microsoft.com**.

4. On the **Details** tab, enter all the information you have available in the following sections:

   - **Address**
   - **Company Information**
   - **Lead Information**
     It is very important to provide the lead source information so that you can determine which marketing method, such as advertisement or trade shows, generates the most leads for your organization. If you specify lead information, you can filter on **Lead Source** to determine how many leads were generated by a given method.

   In the following boxes, observe any noted restrictions or requirements:

   - **ZIP/Postal Code**
     Enter a code of 20 characters or fewer.
   - **Annual Revenue**
     You must enter numbers between 0.00 and 1,000,000,000.00.

You can use commas and a decimal point, but you cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **No. of Employees**
  You must enter a whole number between 0 and 1,000,000.
- **SIC Code**
  Indicate the Standard Industrial Classification (SIC) code for this account. You can search on SIC for organizations with a particular code to display all accounts of businesses in that category. Enter a code of 20 characters or fewer.
- **Industry**
  If the lead specifies an industry that is not in the list, you can work with your system administrator to get new industries added to the list because this field is customizable. This field is used in various reports such as Lead Source Effectiveness; which, if used with filtering, can display the lead source effectiveness by industry. Another form that includes the industry field is the Account form. If your system administrator adds custom industries to the Leads form, they should also add them to the Account form to keep the two lists in synch.

5. On the **Administration** tab, enter information or observe any noted restrictions or requirements as needed:

- **Owner**
  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
- **Status Reason**
  This value appears in the list of leads in the Leads area. You can sort by the **Status Reason** column in that area to quickly view new leads or those already contacted.
- **Source Campaign**
  Search for and enter the campaign record if this lead was generated as a result of a campaign that has been created in Microsoft Dynamics CRM.
- **Contact Methods**
  - **Preferred**
    Select the option that best describes the preferred method of contact.
  - **E-mail**
    If you select **Allow**, Microsoft Dynamics CRM allows all e-mail, including e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any e-mail to be sent to the e-mail address associated with the record.
  - **Bulk E-mail**
    If you select **Allow**, Microsoft Dynamics CRM allows any e-mail as part of a bulk e-mail process, including bulk e-mails related to campaign activities, to be sent to the e-mail address associated with the record. However, if you select **Do Not Allow**, Microsoft Dynamics CRM does not allow any bulk e-mail to be sent to the e-mail address associated with the record.
  - **Phone**
    The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving phone calls.
  - **Fax**
    The selected option simply provides information to anyone who views the record.

- **Mail**
  The selected option simply provides information to anyone who views the record. This field is not used by Microsoft Dynamics CRM to control initiating or receiving mail.

- **Marketing Information**
  - **Send Marketing Materials**
    If you select **Yes**, marketing material corresponding to campaigns is sent to the respective addresses (e-mail, physical address) for the record. This includes general marketing mailers that might be sent on a regular basis that are not part of a targeted marketing campaign. If you select **No**, marketing materials are not sent, nor can activities related to sending marketing materials be created for the record.
  - **Last Date Included in Campaign**
    Microsoft Dynamics CRM automatically sets the date for this field when any marketing communication is sent to the addresses for the record. You can also manually update this field and enter a date. This field is used as filter criteria in Marketing Automation. For example, the **Anti-spam Setting** area of a Campaign form uses the date in this field to ensure that you do not send frequent mailers to a customer.

6. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
7. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Tip

To qualify or disqualify a lead, you convert the lead. First, open the lead that you want to convert, click **Convert Lead**, select options for how you want to convert the lead, and then click **OK**.

Qualify and convert a lead to an account, contact, and/or opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Turning leads into customers, or at least opportunities, is the goal of any organization. After you qualify a lead based on metrics used by your organization, you can use Microsoft Dynamics CRM to quickly create up to three new records in which the lead is represented as an account, contact, and/or opportunity.

Only one lead at a time can be converted, unless you add the leads you want to convert to a marketing list. More information: Work with Marketing Lists

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the list of leads, open the lead you want to qualify and convert.
3. On the Standard toolbar, click **Convert Lead**.
4. In the **Convert Lead** dialog box, select **Qualify and convert into the following records**, and then select one or more of the following:
   - **Account**
     Select this option to create an account record. This applies if there is an actual company you are doing business with.
   - **Contact**
     Select this option to create a contact record. This applies if you are doing business with an specific individual at a company or just an individual customer (consumer).
   - **Opportunity**
     If this is the only option you select, then in the **Potential Customer** box, you must associate either an account or contact with the lead. Click the **Lookup** button to search for an account or contact.
   - **Open newly created records**
     Select this option to open the record in a new window. If you only select a single option, such as **Account**, the new record opens as an account. If you select **Account** and **Contact**, the new record opens as a contact. If you select all three options, the new record opens as an opportunity.
   - **Currency**
     If you select **Opportunity**, you must select the currency in which the opportunity will be calculated.
5. Click **OK**.
6. If you did not select the **Open newly created records** check box, then on the Standard toolbar, you must click **Close** to close the lead record.

Tip

To view the lead record after it has been converted to an opportunity, open the opportunity, and then click **Originating Lead** on the **Administration** tab.

Notes

- Based on the security privileges assigned to your user account, you might not be able to qualify leads that you do not own. If you have to qualify them, you must get the necessary privileges. Also, regardless of who qualifies the lead and performs the conversion, all the newly created records are, by default, owned by the user who owned the original lead.
- Any notes on a lead record do not transfer to the new account, contact or opportunity record, and remain with the originating lead record.

Qualify or convert multiple records at once

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

If you need to disqualify a group of leads or if you decide a group of leads are all good, you do not have to process them one by one. Instead, put the leads into a marketing list, and then disqualify the whole group or qualify them by converting the whole group into accounts, contacts, or opportunities all in one step.

1. Create a new marketing list.
    a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
    b. On the Actions toolbar, click **New**.
    c. In the **Name** box, type a name for the list, and in the **Member type** box, select **Lead**.
    d. Click **Save**.
2. Under **Details**, click **Marketing List Members**.
3. On the Actions toolbar, click **Manage Members**.
4. In the **Manage Members** dialog box, click **Use Advanced Find to add members**, and then click **OK**.
5. Create a query to find the list of leads to disqualify or convert.
    a. From the **Use Saved View** list, select **My Open Leads**.
    b. Add any additional criteria you need to the query.

Tip

If this query is one that you will use again, click **Save As**, and specify a name for the query.

6. To see the records, click **Find**.
7. Select one of the option buttons at the bottom of the window either to add all the leads returned by the search to the list or to add only selected leads to the list, and then click **Add to Marketing List**.
8. In the marketing list, select multiple lead records:
    - Select several records by pressing the CTRL key while you click each record.
    - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.

- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

Tip

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

After you select the leads you want to convert, on the **More Actions** menu, click **Convert Lead**.

In the **Convert Lead** dialog box, disqualify the leads, or select the record types to convert the leads to, and then click **OK**. The leads will still appear on your marketing list, but will no longer appear in your **My Open Leads** view.

Disqualify and close a lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When you decide that a lead will not turn into an opportunity or become a customer, you can disqualify it and still have an audit trail for your sales process. If you delete a lead, rather than disqualify it, any attachments or notes will be removed. If a lead you disqualify contacts you in the future, you have the option of reactivating the record without having to re-enter all the data.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the list of leads, open the lead you want to disqualify.
3. On the Standard toolbar, click **Convert Lead**.
4. In the **Convert Lead** dialog box, select **Disqualify**, and then from the **Status** list, select an option.
5. Click **OK**.
6. On the Standard toolbar, click **Close**.

Note

Disqualified leads appear in the **Closed Leads** view.

Reactivate a closed lead

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You disqualify a lead by closing the lead record. Although closed leads can be reactivated, deleted leads are permanently removed and cannot be reactivated. When you reactivate a lead, you save time by not having to re-enter any data and you maintain the original history of the lead.

1. In the Navigation Pane, click **Sales**, and then click **Leads**.
2. In the **View** list, click **Closed Leads**.
3. In the list of closed leads, open the lead you want to reactivate.
4. On the **Actions** menu, click **Reactivate Lead**.
5. In the **Confirm Lead Activation** dialog box, click **OK**.
6. Click **Save** or **Save and Close**.

Add or remove a customer record in a marketing list

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a customer record, such as a lead, account, or contact, to a marketing list. If a customer record is added to a marketing list from another area within Microsoft Dynamics CRM, the customer record is updated to reflect this association. Therefore, if you want to add a customer record, such as a lead, to a marketing list, you might find that the lead is already associated with the list.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts** depending on which type of record you want to add to a marketing list.
2. In the list, open the record that you want to add to a marketing list.
3. Under **Marketing**, click **Marketing Lists**.
4. On the Actions toolbar, click **Add to Marketing List**.
5. In the **Look Up Records** dialog box, locate and select the marketing list you want to add the record to, and then click **OK**.
6. Click **Save** or **Save and Close**.

Note

To remove a record from a marketing list, open the customer record you want to remove from the marketing list. On the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Tip

If you cannot locate the marketing list you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

View associated campaigns from customer records

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can view a list of campaigns for a customer from within the Customer Record form. When a customer record is added to a marketing list and that marketing list is added to a campaign, the customer record is updated to reflect this association.

1. In the Navigation Pane, click **Sales**, and then click **Leads**, **Accounts**, or **Contacts**, depending on which type of record you want to view associated campaigns for.
2. In the list, open the record that you want to view.
3. Under **Marketing**, click **Campaigns** to see the list of campaigns the customer is included in.

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

From a list of records, including the results of a search You can run a quick campaign from any list of accounts, contacts, or leads.

a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

- **For Selected Records**
  Select this option if you have selected one or more records in the list.
- **For All Records on Current Page**
  Select this option to include all records on the page for the quick campaign activity.
- **For All Records on All Pages**
  Select this option to include all records on all pages for the quick campaign activity.

From the **Marketing Lists** list You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Select the marketing list or marketing lists for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

From a marketing list You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Double-click the marketing list for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**.

4. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

Notes

- You cannot add additional records to a quick campaign after you have created it.
- In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). This choice affects who can see and take action on an activity. For example, if you were creating a phone call activity for all of the sales representatives, you could select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative could then see the activity and take action on it. However, if you were creating a large number of e-mail activities that Microsoft Dynamics CRM would perform automatically, you could assign the e-mail activity to yourself instead of the record owners.
- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.
- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Managing Opportunities

An opportunity is a potential sale, which is similar to a lead. However, the subtle difference is that with an opportunity you can forecast sales revenue, set a potential close date, and factor in a probability for the sale to occur.

When you create an opportunity, you must specify an existing account or contact record. Also, an opportunity requires that you link the record to a particular price list. This is needed for the automated pricing of the proposed products that the opportunity is interested in purchasing.

Using opportunities in your business process enables you to run pipeline reports to view estimated revenue flows based on pending new sales.

Creating and Converting Opportunities

You can create a new opportunity that did not originate from a lead, or you can convert qualified leads to opportunities without re-entering the data, and then you can track opportunities through the sales cycle.

When you convert a qualified lead to an account, contact, or opportunity, you can access the lead record, which includes activities and notes, from the corresponding opportunity form. You can also access the lead information if you create a new opportunity and link it to a lead record. You cannot convert an opportunity to a lead; you can only close opportunities.

You can use Microsoft Dynamics CRM to track information about each opportunity, such as:

- Contact information.
- Salesperson who is actively working on the opportunity.
- Assessment on the probability of closing the sale and turning the opportunity into a customer.
- Projected closing date of the sale.

Understanding How Accounts, Contacts, Leads, and Opportunities Relate

Account and contact records represent established customers. Leads are potential or prospective customers. Opportunities are not a specific customer, such as a lead, contact, or account, and therefore require a customer record to be added to the opportunity.

How you can use lead, opportunity, contact and account records to facilitate the process of generating new customers is described in the following scenario:

A Sales and Marketing team uses methods to gather leads. For example, the sales and marketing team holds a seminar and gathers business cards from participants. Personal names, businesses names, addresses, and phone numbers are gathered from the seminar and then entered into Microsoft Dynamics CRM as lead records. The lead records are assigned to the sales staff based on certain criteria, such as the lead's ZIP Code/Postal Code.

Next, sales staff contact the leads to qualify them. The salesperson may initiate a telephone call to the lead and ask questions such as "Are you interested in purchasing our products?" and "When do you intend to purchase?"

Based on the information collected from the previous lead qualification process, the salesperson uses Microsoft Dynamics CRM to either disqualify the lead or convert the lead into three new records in Microsoft Dynamics CRM:

- An account for the business
- A contact for the person who the sales staff is working with
- An opportunity for the potential sale

The contact that is created has the account configured as the parent account.

Recalculating Opportunities

Opportunities with products added to them have their estimated revenue value calculated based on the base price, volume discounts, manual discounts, taxes, and other pricing modifications. When opportunities are saved, Microsoft Dynamics CRM recalculates the estimated revenue value based on any changes to the products or product quantities associated with the opportunity.

However, if you want to update the estimated revenue value of an opportunity without saving, closing, and reopening it, you can do this by manually recalculating the value. Recalculating an opportunity is useful when there are two or three different scenarios in terms of the estimated revenue that could be generated by the opportunity.

In this case, you can modify the selection of products to match each scenario and then recalculate the opportunity. Microsoft Dynamics CRM does not save the recalculations unless you choose to save and close the opportunity. If you modify products without recalculating, you must save and close the opportunity and then reopen it to see the updated estimated revenue.

Associating Relationships

You can create a relationship between opportunities, accounts, or contacts; specify the type of relationship between them; and define the relationship role that the account or contact has with regard to the opportunity.

The relationship role assigned to the associated account or contact determines how the account or contact affects, influences, or contributes to the opportunity. For example, if you add an account as a relationship to the opportunity, anyone who views the account data will see that there is a current opportunity with the account that could result in a new sale.

Adding Sales Transactions

You can start a sales transaction, such as a quote, order, or invoice, from within the opportunity record. The advantage of starting sales transactions in this manner is that much of the information is automatically entered based on the opportunity data. You can also view any sales transaction records from within the opportunity record to track the overall sales process and expected revenue. You cannot convert an opportunity to an order, quote, or invoice, but you can associate the opportunity to these records.

Associating Competitors

You can associate the opportunity with competitors so that you and your team know who you are working against. Opportunities can be linked with competitor information and analyzed to identify the most effective selling strategies. If you determine that the competitor you have associated with an opportunity is no longer a threat to making the sale, you can disassociate that competitor from the opportunity without deleting the competitor record from Microsoft Dynamics CRM.

Work with Opportunities

Opportunities represent a potential sale to an account or contact.

Create or edit an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Part of your sales process will likely involve creating opportunities. You may have an existing customer call and ask about a new product or service your organization is offering. In this case, you would want to create an opportunity because it is an existing customer and there is a greater chance that this opportunity will result in a sale.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. On the Actions toolbar, click **New**, or open the record that you want to edit.
3. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:

- **Topic**
  This information should reflect what the opportunity is interested in. For example, if an existing customer called and asked for details on a product, then you would want to list the name of the product as the topic. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
- **Potential Customer**
  This customer will be either the account or contact associated with this opportunity.
  This value appears in the list of opportunities on the main opportunities page.
- **Price List**
  If your company has price lists set up, specify the appropriate price list.
- **Currency**
  Select the currency in which the opportunity will be calculated.
- **Revenue**
  If pricing is automated for your company, select **System Calculated**. If not, select **User Provided**.
- **Est. Revenue**
  Opportunities with products added to them have their estimated revenue value calculated based on the base price, volume discounts, manual discounts, taxes and other pricing modifications. When opportunities are saved, Microsoft Dynamics CRM recalculates the estimated revenue value based on any changes to the products or product quantities associated with the opportunity.
  This value appears in the list of opportunities on the main opportunities page.
- **Est. Close Date**
  You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
  If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.
  This value appears in the list of opportunities on the main opportunities page.

- **Probability**
  Enter a number between 1 and 100 to indicate the likelihood of a sale occurring.

4. On the **Administration** tab, enter information or observe any noted restrictions or requirements as needed:

   - **Owner**
     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
   - **Originating Lead**
     If this opportunity was the result of converting a lead, then this field will automatically show the lead record.
   - **Source Campaign**
     If this opportunity was a result of converting a campaign response to a lead, or if this field was set when the lead was created, then this field will automatically show the campaign record. However, you cannot set the **Source Campaign** field for a completely new opportunity record.

5. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
6. Click **Save** or **Save and Close**.

▸ Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Note

To convert an opportunity into the originating lead, open the opportunity, click the **Administration** tab, and then click the lead in the **Originating Lead** box. Then, in the lead form, click **Reactivate Lead** on the **Actions** menu. Close the opportunity that was created when you converted the lead.

▸ **Tips**

- When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.
- To add a related record, on the **Actions** menu, point to **Add Related**, and then click the record type you want. Complete the form as needed.

Add or remove a product

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity to which you want to add a product.
3. On the **General** tab, verify that a price list appears in the **Price List** field.

   Selecting a price list is required before you can add a product. Microsoft Dynamics CRM uses the price list to automatically calculate values for the following fields after you save the opportunity:

   - **Price Per Unit**
   - **Volume Discount**
   - **Manual Discount**
   - **Extended Amount ($)**
4. Under **Details**, click **Products**.
5. On the **Actions** bar, click **New Opportunity Product**.
6. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:
   - **Product**

     Click the **Lookup** button to search for and add a product.
   - **Unit**

     Click **Lookup** to search for and add a unit.
   - **Quantity**

     Enter the number of product items.
     You must enter numbers between 0.00 and 1,000,000,000.00.
     You can use commas and a decimal point, but you cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).
   - **Manual Discount**

     If appropriate, enter a discount.
     You must enter numbers between 0.00 and 1,000,000,000.00.
     You can use commas and a decimal point, but you cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).
7. Click **Save** or **Save and Close**.

Notes

- You can also remove a product from an opportunity. Under **Details**, click **Products**, and then select the product you want to remove. On the Actions toolbar, click the **Delete** button .
- To add a write-in product, you must create at least one price list in the product catalog. To add a product from the product catalog, you must create at least one unit group, price list, and product. More information: Creating the Product Catalog

Associate an account or contact with an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You associate opportunities with accounts or contacts by creating an opportunity relationship between them. The relationship you set up is based on your selection in the **Opportunity Relationship** dialog box. Therefore, if you want to create an opportunity relationship with the specific opportunity you open, make sure that you select that opportunity.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity to which you want to add a relationship with a customer record.
3. On the **Actions** menu, click **Add Relationship**.
4. In the **Opportunity Relationship** dialog box, enter information in the following boxes:
   - **Opportunity**
     You must select the opportunity that will be associated with the customer. Click the **Lookup** button to search for an opportunity.
   - **Customer**
     You must associate either an account or contact with the opportunity. Click the **Lookup** button to search for an account or contact.
   - **Customer Role**
     Select an option from the list. This field can be customized, so the values will vary.

     Your organization might set up relationship roles, to indicate the role of your customers as they relate to your business. This field is not required.

     If there are no relationship roles in the list or the relationship role you want is not listed, contact your system administrator and ask them to add the relationship role to the **Relationship Roles** area, which is located in the **Settings** area.
   - **Description**
     Use this field to provide additional information about the relationship.
5. Click **Save** or **Save and Close**.
   Repeat this step to save the account or contact.

Notes

- To remove a relationship, open the opportunity, and then under **Details**, click **Relationships**. In the relationships list, click the relationship that you want to delete, and then click the **Delete** button .
- You cannot set up duplicate relationships between a customer record and an opportunity. For example, if you create a relationship between an account and the opportunity, and the customer's relationship role is set to Distributor, you cannot create a new relationship for the account that uses the same customer opportunity and relationship role.

Add or delete a quote, order, or invoice

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity to which you want to add a quote, order, or invoice.
3. Under **Sales**, click one of the following:
   - **Quotes**
     If you select this option, on the Actions toolbar, click **New Quote**.
   - **Orders**
     If you select this option, on the Actions toolbar, click **New Order**.
   - **Invoices**
     If you select this option, on the Actions toolbar, click **New Invoice**.
4. Complete the form as needed. More information:
   - Work with Quotes
   - Work with Orders
   - Work with Invoices
5. Click **Save** or **Save and Close**. Repeat this step to save the opportunity.

Note

To delete a quote, order, or invoice from within an opportunity, under **Sales**, click **Quotes**, **Orders**, or **Invoices**. Select the record you want to remove. On the Actions toolbar, click the **Delete** button . Deleting the quote, order, or invoice from the opportunity permanently deletes the record.

Add or remove a competitor

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You can add a known competitor to an opportunity record to help you track other companies who are competing against you for a potential sale. If you determine that the competitor you have associated with an opportunity is no longer a threat to making the sale, then you can disassociate that competitor from the opportunity without deleting the competitor from Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity to which you want to add or remove a competitor.
3. Under **Sales**, click **Competitors**.
4. On the Actions toolbar, click **Add Existing Competitor**.
5. Locate and select the competitor or competitors.
6. Click **Save** or **Save and Close**.

Note

To disassociate a competitor from an opportunity, first open the appropriate opportunity, and then under **Sales**, click **Competitors**. On the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Recalculate the estimated revenue

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity for which you want to recalculate the estimated revenue.
3. Modify the list of products associated with the opportunity. (When opportunities are saved, Microsoft Dynamics CRM recalculates the estimated revenue value based on any changes to the products or product quantities associated with the opportunity.)
4. In the **Estimated Revenue** section, verify that **System Calculated** is selected, and then on the **Actions** menu, click **Recalculate**.
5. Click **Save** or **Save and Close**.

Close an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Whether you win a sale or lose it, you probably want to close the opportunity. If you have lost the sale, you can delete the opportunity, but deletions are not recommended because they are permanent. If you delete the opportunity, related items such as attachments and notes are also deleted, in addition to the audit trail for your sales organization. Therefore, it is best to close the opportunity. You will have the option to reopen the opportunity later if it becomes a viable sale.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the list of opportunities, open the opportunity you want to close.
3. On the **Actions** menu, click **Close Opportunity**.
4. In the **Close Opportunity** dialog box, click a **Status** option.

   If you select **Won**, enter the appropriate information in the following fields:

   - **Status Reason**
     The default for this field is **Won**. Your systems administrator can make changes to the default status for your organization if desired.
   - **Actual Revenue**
     You must enter numbers between 0.00 and 1,000,000,000.00.
     You can use commas and a decimal point, but you cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).
     This value should represent the actual agreed upon price.
   - **Close Date**
     You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
     If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.
   - **Description**
     Enter the reason for the win.

   If you select **Lost**, enter the appropriate information in the following fields:

   - **Status Reason**
     Select an option. The default options are **Canceled** or **Out-Sold**. Your systems administrator can change the default status for your organization that you want.
   - **Actual Revenue**
     You do not have to enter a value. However, it is helpful to know what the deal was worth had it been achieved.
     You must enter numbers between 0.00 and 1,000,000,000.00.
     You can use commas and a decimal point, but you cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

- **Close Date**
  You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
  If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.
- **Competitor**
  If you know the competitor you lost the deal to, click the **Lookup** button to search for a competitor.
- **Description**
  Enter the reason for the loss.

5. Click **OK**.
6. On the Standard toolbar, click **Close**.

Reopen an opportunity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

An opportunity you closed previously might become viable again. If this occurs, you can reopen the opportunity. You cannot reopen a deleted opportunity. You must create a new opportunity if you deleted one instead of closing it.

1. In the Navigation Pane, click **Sales**, and then click **Opportunities**.
2. In the **View** list, click **Closed Opportunities**.
3. In the list of opportunities, open the opportunity you want to reopen.
4. On the **Actions** menu, click **Reopen This Opportunity**.
5. In the **Reopen This Opportunity** dialog box, click **OK**.
6. Click **Save** or **Save and Close**.

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.
- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Competing for Customers

Using competitor information management, you can compile a repository of information, such as product literature, pricing structures and product reviews, for each of your competitors. If you add products or sales literature to a competitor record, your sales staff will be able to access the competitor data from within the product or sales literature forms.

You can also create and maintain information about your competitors' strengths and weaknesses, and the opportunities you are both working on. Your sales force can use this information to better understand who they are working against on a deal. If you create a relationship between a competitor and an opportunity, you can access information about both from either form.

The competitor information management in Microsoft Dynamics CRM also helps you associate opportunities to competitors so you can assess opportunities lost to or won against each competitor.

Work with Competitor Records

Competitors represent people or organizations that your business unit competes with for sales opportunities.

Create or edit a competitor

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Tracking competitors is a key aspect of a sales process. The more information your team has about a competitor's strengths, weaknesses, opportunities, and the threats a competitor might have to your organization's ability to make a sale, the more likely you are to win against that company.

1. In the Navigation Pane, click **Sales**, and then click **Competitors**.

2. On the Actions toolbar, click **New**, or open the record that you want to edit.

3. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:

   - **Name**
     You must enter a name with a length of 100 characters or fewer. The information should be meaningful and unique. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.
   - **Ticker Symbol**
     If you enter a ticker symbol for a market outside the United States, you must prefix it with the country code, for example US:MSFT (*country code:ticker symbol*). This information is available only for markets that are currently listed on the MSN Money Web site. In addition to the United States (US), MSN Money also provides information for markets in Australia (AU), Belgium (BE), Canada (CA), France (FR), Germany (DE), Great Britain (GB), Italy (IT), Japan (JP), Netherlands (NL), Spain (ES), and Sweden (SE). For more information, go to the MSN Money Web site.
   - **Key Product**
     Enter the competitor's product that you most frequently compete with for sales.
   - **Web Site**
     Web site addresses must be valid. For example, **http://www.adventure-works.com**.
   - **Reported Revenue**
     You must enter numbers between 0.00 and 1,000,000,000.00.
     You can use commas and a decimal point, but you cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).
   - **Address**
     Enter all the address information you have available for this competitor. Note this restriction:
     ZIP/Postal Code
     Enter a code of 20 characters or fewer.

4. On the **Analysis** tab, enter everything you know about the competitor.

5. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.

6. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The match codes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Add or remove products for a competitor

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Sales Permissions

Knowing the products your competitors carry helps you to identify areas within your own inventory where you can expect the greatest challenges to making a sale. If you list the products your competitors carry, then you can create a scorecard that helps your sales organization present data to potential customers about how your products provide benefits that your competitors cannot meet.

1. In the Navigation Pane, click **Sales**, and then click **Competitors**.
2. In the list of competitors, open the competitor you want to add products to.
3. Under **Details**, click **Products**.
4. On the Actions toolbar, click **Add Existing Product**.
5. In the **Look Up Records** dialog box, search for and select the products you want to add to the competitor, and then click **OK**.
6. Click **Save** or **Save and Close**.

Notes

- To remove products from a competitor, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the products you want to remove. On the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.
- By default, you cannot add a competitor's product to a competitor record. If you want your competitor's product in Microsoft Dynamics CRM, you have to customize the product catalog to allow for products sold by your competitors, instead of by your organization. If you customize the product catalog with competitor products, then you can link competitor products as substitute products in the competitor record.

Add or remove opportunities for a competitor

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Adding existing opportunities to a competitor record helps you track other companies who are competing against you for a potential sale. If you determine that the competitor is no longer a threat to making the sale with the associated opportunity, then you can remove that opportunity from the competitor without deleting the opportunity from Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Sales**, and then click **Competitors**.
2. In the list of competitors, open the competitor you want to add an opportunity to.
3. Under **Sales**, click **Opportunities**.
4. On the Actions toolbar, click **Add Existing Opportunity**.
5. In the **Look Up Records** dialog box, search for and select the opportunity you want to add to the competitor, and then click **OK**.
6. Click **Save** or **Save and Close**.

Tip

If you cannot locate the opportunity you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Note

To remove an opportunity from a competitor, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the opportunity you want to remove. On the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Add or remove sales literature for a competitor

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Adding existing sales literature to a competitor record helps you to track information, such as product or service offerings, about the competitor. You can relate or link a competitor's sales literature that you collect directly from the competitor form. If the sales literature becomes out-dated or the competitor no longer offers the products, then you can remove the sales literature from the competitor without deleting the sales literature from Microsoft Dynamics CRM.

1. In the Navigation Pane, click **Sales**, and then click **Competitors**.
2. In the list of competitors, open the competitor you want to add sales literature to.
3. Under **Sales**, click **Sales Literature**.
4. On the Actions toolbar, click **Add Existing Sales Literature**.
5. In the **Look Up Records** dialog box, search for and select the sales literature you want to add to the competitor, and then click **OK**.

6. Click **Save** or **Save and Close**.

Note

To remove sales literature from a competitor, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the sales literature you want to remove. On the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.
- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Work with Sales Literature

Use this page to create, view, edit, and print sales literature records. You can also use this list to preview or open existing sales literature records.

Add or edit sales literature

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. On the Actions toolbar, click **New**, or open the sales literature record that you want to edit.
3. In the **Title** box, type a title for the sales literature. This field is required.
4. In the **Subject** box, click the **Lookup** button to search for the subject you want. This field is required. If the subject you want does not appear in the list, contact your system administrator to add it. More information: Requesting User Interface Changes
5. In the **Subject Lookup** dialog box, select the subject you want, and then click **OK**.
6. In the **Employee Contact** box, click **Lookup**. In the **Look Up Records** dialog box, select the user record for the employee you want to associate with the sales literature record, and then click **OK**. The person you select is typically the person responsible for the creation or maintenance of the sales literature.
7. In the **Type** list, select the sales literature type that most closely matches the description of the sales literature.
8. In the **Expiration Date** box, select or enter a date. For example, if the sales literature is associated with a sale, the date the sale ends would be the expiration date. You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
   If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

9. Under **Details**, click **Documents**.
10. On the Actions toolbar, click **New Document**.
11. Enter a title (required field), author name, keywords, and an abstract for your document.
12. If you want to attach a file to the document, type its name in the **File Name** box or click **Browse** to locate the file, and then click **Attach**. Attaching a file might take a few minutes, depending on the size of the file.
13. In the document form, click **Save and Close**.
14. In the sales literature form, click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Tip

Although you cannot attach sales literature documents directly to e-mail activities and send them to customers, you can save the document to your desktop and then attach it to the outgoing e-mail.

Add or remove documents

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Similar to how you attach a file to any record, you can attach documents to your sales literature. However, when you add a document, you must enter a title. You can also specify the author and add keywords, which you or someone else can use later to locate the document.

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. In the list of sales literature, open the sales literature record you want to add a document to.

3. Under **Details**, click **Documents**.
4. On the Actions toolbar, click **New Document**.
5. Enter a title (required field), author name, keywords, and an abstract for your document.
6. If you want to attach a file to the document, type its name in the **File Name** box or click **Browse** to locate the file, and then click **Attach**. Attaching a file might take a few minutes, depending on the size of the file.
7. Click **Save** or **Save and Close**.

Tip

Although you cannot attach sales literature documents directly to e-mail activities and send them to customers, you can save the document to your desktop and then attach it to the outgoing e-mail.

Note

To remove documents from sales literature, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the documents you want to remove. On the Actions toolbar, click the **Delete** button . In the confirmation message, click **OK**.

Add or remove products

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

If you develop sales literature to support your products, you can link the two types of records. When you are selling a particular product, you will know what information is available about the product.

1. In the Navigation Pane, click **Sales**, and then click **Sales Literature**.
2. In the list of sales literature, open the sales literature you want to add products to.
3. Under **Details**, click **Products**.
4. On the Actions toolbar, click **Add Existing Product**.
5. In the **Look Up Records** dialog box, search for and select the products you want to add to the sales literature, and then click **OK**.
6. Click **Save** or **Save and Close**.

Notes

- To remove products from sales literature, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the products you want to remove. On the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.
- When you add or remove a product from a sales literature record, both records are updated to reflect the association between them.

Understanding Quick Campaigns

You can use a quick campaign to communicate with an ad-hoc list of customers (accounts, contacts, or leads). More information: Work with Quick Campaigns

Selecting recipients for the quick campaign

There are three ways you can select the list of recipients for your quick campaign:

- Select the accounts, contacts, or leads directly.
- Select one or more marketing lists.
- Do a search in Advanced Find and create a quick campaign from the resulting list of records.

Creating the quick campaign

When you create your new quick campaign, you can choose whether you want to own the activities that you distribute, or whether each of the users who own the records in your quick campaign should own the distributed activities. If you use the quick campaign to create and distribute e-mail activities, you can also choose whether you want Microsoft Dynamics CRM to automatically send the e-mail messages and whether the corresponding e-mail activities should be closed.

After you finish configuring your quick campaign, Microsoft Dynamics CRM immediately creates and distributes the activity you specified for all of the customers you selected.

Working with the completed quick campaign record

After you have used a quick campaign to quickly distribute activities, you can use the quick campaign record to:

- Collect, view, and take action on campaign responses.
- View the activities created from the quick campaign and the current status on those activities.
- Close one or more open activities created from the quick campaign.
- View the records for the customers who were contacted.
- View the records for customers who could not be contacted and an explanation for why these customers were not included in the quick campaign.

Differences between campaigns and quick campaigns

In contrast to campaigns, quick campaigns do not include many of the same tracking and reporting features, and support only one type of activity for each quick campaign. However, you can use quick campaigns to distribute a single activity automatically to an ad-hoc selection of marketing lists, accounts, contacts, or leads.

Campaigns can represent an organization's marketing efforts over an extended period of time. The effects of a quick campaign are immediate.

Another key difference between campaigns and quick campaigns is in how marketing lists work with quick campaigns. Using quick campaigns, you can still select one or more marketing lists and create activities for all of the records in those lists. However, Microsoft Dynamics CRM does not associate the marketing list itself with the quick campaign. Instead, activities are created only for the accounts, contacts, or leads that were included in the marketing list or lists when you selected them.

Additional quick campaign features in Microsoft Dynamics CRM for Outlook

Some quick campaign features are available only in Microsoft Dynamics CRM for Outlook :

- Compose personalized e-mail messages using a template.
- Send messages in simple HTML or rich text format with the mail merge feature.

Work with Quick Campaigns

Although you can print or export the quick campaign list and delete quick campaigns you no longer need, you must select records in other lists to create a new quick campaign.

Caution: Deleting a quick campaign record deletes all of the activities created by the quick campaign, even if those activities were not yet complete.

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

From a list of records, including the results of a search You can run a quick campaign from any list of accounts, contacts, or leads.

a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

- **For Selected Records**
  Select this option if you have selected one or more records in the list.
- **For All Records on Current Page**
  Select this option to include all records on the page for the quick campaign activity.
- **For All Records on All Pages**
  Select this option to include all records on all pages for the quick campaign activity.

From the **Marketing Lists** list You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Select the marketing list or marketing lists for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

From a marketing list You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Double-click the marketing list for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**.

4. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

Notes

- You cannot add additional records to a quick campaign after you have created it.
- In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). This choice affects who can see and take action on an activity. For example, if you were creating a phone call activity for all of the sales representatives, you could select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative could then see the activity and take action on it. However, if you were creating a large number of e-mail activities that Microsoft Dynamics CRM would perform automatically, you could assign the e-mail activity to yourself instead of the record owners.
- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Completing Sales Transactions

Completing Sales Transactions

The life of a successful sales transaction typically starts with a draft quote. When the quote is ready, it is activated and sent to the customer. A quote frequently undergoes several revisions between the salesperson and customer before it is accepted.

After the quote is accepted, an order is generated from the quote. The order is used to fulfill the agreement of goods or services that were offered in the quote. Finally, after the order for the goods or services is shipped, an invoice is generated.

In Microsoft Dynamics CRM, quotes, orders, and invoices are considered to be the same item, but in different states of transition.

Your sales force can use the tools and templates in Microsoft Dynamics CRM to create and print quotes, orders, and invoices when they are working either online or offline at a customer site. Additionally, these tools are used to set expiration dates and convert quotes into orders or orders into invoices.

Understanding Quote Stages

To some extent, the definitions of the stages of quotes will be set at your organization. However, when you create a new quote, it is automatically set to Draft, and the revision ID is set to 0.

In many organizations, a quote needs a manager's confirmation before being set to Active. Some organizations use workflow to route the quote to the manager to review it and turn it to Active. In other organizations, the person who creates the quote can set it to Active.

Only an active quote should be sent to a customer. Once a quote is made active, it becomes read-only so that the version you sent to the customer matches what you have in-house. If you need to revise a quote, you can revise it, and the revision ID will increase by one. This way, you can correlate your revision of the quote with what has been sent to the customer.

When you close a quote, you have three choices: Lost, Canceled, or Revised. If you choose to revise the quote, a new quote is created, set to Draft status, and you can start over. If you choose not to revise the quote, the quote is closed.

Differences between Current Pricing and Prices Locked

Microsoft Dynamics CRM has two kinds of pricing behavior on orders and invoices: **Use Current Pricing** and **Prices Locked**.

The **Use Current Pricing** behavior is directly associated with the price per unit for a product that is in the product catalog. Therefore, if a price is changed for a product in the product catalog, the unit price will change in all open invoices as well as both draft and active orders that include that product. This may not be the behavior you want with existing orders or invoices that have already been presented to the customer.

Prices Locked locks the price per unit for a product in an open order or invoice. Even if a price change is made to a product that is in the product catalog, the open order or invoice that has **Prices Locked** enabled will remain at the original price.

Note that, when you enable Prices Locked, you disable Use Current Pricing.

Work with Quotes

Most sales are preceded by a quote or a series of quotes. A quote might go through several revisions before it becomes an order. When you revise a quote by changing products or discounts, those changes are also reflected in your overall sales forecast.

When you first create a quote it has a status of Draft. A quote that is a draft can be changed. When the quote is ready to send to the customer, you change the status of the quote to Active. When you open a quote that is active, the quote information is displayed as read-only and cannot be changed.

Create or edit a quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. On the Actions toolbar, click **New**, or open the record that you want to edit.

   Note: To edit an active quote, you must select **Revise** on the **Actions** menu. The status of a quote is listed in the **Status** column.

3. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:
   You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks.

   - **Quote ID**

     This information is automatically created. System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.

   - **Revision ID**
     This information is automatically created. The **Revision ID** tracks the number of times an active quote has been revised.
   - **Name**
     You must enter a name with a length of 100 characters or fewer. The information should be meaningful and unique. By default, these records are sorted by Name in the records list.
   - **Potential Customer**
     Search for and select an account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Currency**
     Select the currency in which the quote will be calculated.
   - **Price List**
     Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

   In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

   - **Detail Amount**
     This box is read-only and automatically calculates the sum of all existing quote, order, or invoice line items, which includes products and write-in products.

- **Quote Discount (%)**
  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).
- **Quote Discount**
  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).
- **Pre-Freight Amount**
  This box is read-only and automatically calculates a subtotal based on the detail amount and any discounts.
- **Freight Amount**
  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).
- **Total Tax**
  The total tax is calculated when you click **Recalculate** or when you click **Save**.
- **Total Amount**
  The total amount is calculated when you click **Recalculate** or when you click **Save**.

4. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
5. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Tips

- To activate a quote, on the **Quote** form, on the **Actions** menu, click **Activate Quote**.

- You must manually enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.
- When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Add or remove a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   – OR –

   In the Navigation Pane, click **Sales**, and then click **Orders**.

   – OR –

   In the Navigation Pane, click **Sales**, and then click **Invoices**.

2. In the list of quotes, orders or invoices, open the record you want to add a contact to.
3. Under **Details**, click **Other Contacts**.
4. On the Actions toolbar, click **Add Existing Contact**.
5. In the **Look Up Records** dialog box, search for and select the contact records you want to add to the quote, order or invoice, and then click **OK**.
6. Click **Save** or **Save and Close**.

Tip

If you cannot locate the contact you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Note

To remove a contact from a quote, order, or invoice, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the contact or contacts you want to remove, and then on the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Activate a quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Before you send your quote to a customer, you must activate it. When you activate a quote, the quote is displayed as read-only.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the draft quote that you want to activate.
3. On the **Actions** menu, click **Activate Quote**.

Edit an active quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When you revise an active quote, a new quote with a new quote ID is created. The original quote is closed and stored in the Microsoft Dynamics CRM database for tracking purposes.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the record that you want.
3. On the **Actions** menu, click **Revise**.
4. On the **General** tab, make the changes that you want in the following boxes:
   - **Quote ID**

     This information is automatically created. System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.
   - **Revision ID**

     This information is automatically created. The **Revision ID** tracks the number of times an active quote has been revised.
   - **Name**

     You must enter a name with a length of 100 characters or fewer. The information should be meaningful and unique. By default, these records are sorted by Name in the records list.
   - **Potential Customer**

     Search for and select an account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Currency**

     Select the currency in which the quote will be calculated.

- **Price List**
  Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Quote Discount (%)**
  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).
- **Quote Discount**
  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).
- **Freight Amount**
  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).
- **Total Tax**
  The total tax is calculated when you click **Recalculate** or when you click **Save**.
- **Total Amount**
  The total amount is calculated when you click **Recalculate** or when you click **Save**.

5. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
6. Click **Save** or **Save and Close**.

Print a quote with a mail-merge document

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can use a mail-merge template to generate a customer-ready document that displays data from a saved quote, and that includes a header and a footer.

In Microsoft Dynamics CRM for Outlook, only one mail merge can be run at a time. If you want to discontinue a mail merge, close Microsoft Office Word. You can run multiple mail merge processes at the same time in the Web application.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the quote you want to print. If you want to use mail merge with a new quote, before starting the mail merge, save the quote first.
3. On the Actions toolbar, click **Print Quote for Customer** .
4. If you have other languages installed, you can select a language to filter the list of templates.
5. In the **Mail Merge** dialog box, select the type of document you want to use.

Note

If the **E-mail** option is not available, the **Enable Direct E-mail via Mail Merge** option in the **System Settings** may be set to **No**. More information: Manage System Settings

6. Select if you want to start with a blank document or a template. If you select a template option, click the **Lookup** button to select a template.
   New mail merge templates are created in the Settings area. More information: Work with Mail Merge Templates
7. If necessary, you can add or delete data fields. Microsoft Office Word supports up to 64 data fields, of which Microsoft Dynamics CRM for Outlook reserves two data fields to store the primary key and the record owner.

   While working with quotes, removing or re-arranging data fields may cause the quote to not display or print properly. The footer displays after "LastItem", which marks the end of the quote data fields.

8. Click **OK**.
   Microsoft Dynamics CRM automatically opens a Microsoft Office Word document. In the **File Download** dialog box, click **Open**.

   This is not your mail-merge document. This is an interim page. Follow the directions in the Word document, including clicking **CRM**.

9. In the **Mail Merge Recipient** dialog box, verify that the list is accurate, and then click **OK**.
10. To continue the mail merge, follow the instructions provided by the Mail Merge pane. For more information, see the Microsoft Office Word Help documentation.

Tip

- To display the information you want and select the format, in the Mail Merge wizard, click **Address Block** and then **Greeting Line**.

To add data fields to display more information, click **More Items**. You can use up to 64 data fields.

11. If you are working in Microsoft Dynamics CRM for Outlook and you have either created a new template or updated an existing template, you can upload the template.
    - To save the document as a template, on the **Complete the Merge** pane, click **Upload Template to CRM**.

    If you are working in the Web application, you can upload the template in the Settings area. More information: Work with Mail Merge Templates

12. When you have completed work on the mail merge document, close it, and then delete the interim mail-merge document (Mail_Merge_nnnn.xml) and the associated text file (Mail_Merge_nnnn.txt) with the same name.

Warning Mail merge may leave sensitive data on your computer.

The mail merge process creates two files in addition to your mail merge documents. These files are the data sources used by mail merge and contain Microsoft Dynamics CRM data, which may include sensitive customer data. You should delete these data source files after you complete the mail merge.

Both files have the same name: Mail_Merge[nnnn], where *nnnn* is a 4-character, randomly generated number. One file is a.doc file and the other is a.txt file. Unless you moved the files or saved them to another directory, these files are usually in a temporary files folder on your computer.

13. If you are working in Microsoft Dynamics CRM for Outlook, after you merge the new document, you can choose to create Microsoft Dynamics CRM activities for mail-merge items.
    1. In the **Create Activities** dialog box, click **Create Microsoft Dynamics CRM activities**.
    2. If you want to change the default values for the activity, click **Activity Details**, and then make any changes. To save the changes, click **OK**.
    3. Under **Assign activities to**, select to whom the new activities should be assigned.
    4. You can choose to have the new activities closed immediately. E-mail activities are closed as soon as the messages are sent.
    5. If you are creating a mail merge from a marketing list, you can also make the mail merge a quick campaign and include an link in e-mail messages for customers to remove themselves from your marketing lists.
    6. Click **OK** to save the changes and create the activities.

    Closed activities appear in the history list of the customer record. Open activities appear in the activities list of the customer record and in your list of active activities.

Note

If an account or contact does not have a valid e-mail address or has the **Do Not Allow** option set for **Bulk E-mail**, the message is not sent to them, and no e-mail activity is created.

Create an order from a quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

When your customer has agreed to the terms of your quote, you can convert it to an order. In Microsoft Dynamics CRM, you can only convert an active quote to an order.

Note: After you create an order from a quote, you can no longer revise the quote.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the active quote that you want.
3. On the **Actions** menu, click **Create Order**.
4. In the **Create Order** dialog box, you can change the date in the **Date Won** box and add a description in the **Description** box.
5. Click **OK**. The new order record opens automatically.

6. On the **General** tab, make the changes that you want in the following boxes:

- **Order ID**

  This information is automatically created. System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.

- **Name**
  You must enter a name with a length of 100 characters or fewer. The information should be meaningful and unique. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks. By default, these records are sorted by Name in the records list.

- **Customer**
  You must search for and select an account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.

- **Price List**
  Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Order Discount (%)**
  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).

- **Order Discount**
  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).

- **Freight Amount**
  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).

- **Total Tax**
  The total tax is calculated when you click **Recalculate** or when you click **Save**.

- **Total Amount**
  The total amount is calculated when you click **Recalculate** or when you click **Save**.

- **Prices Locked**

  This check box is read-only. You set **Prices Locked** by clicking the **Actions** menu, and then click **Lock Pricing**. Alternatively, you disable **Prices Locked** by clicking the **Actions** menu, and then clicking **Use Current Pricing**.

  More information: Completing Sales Transactions

7. On the **Shipping** tab, enter all the information you have available and observe any noted restrictions or requirements.

You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.

8. On the **Addresses** tab, enter all the information that you have available in the following sections:

   - **Bill To Address**
     Enter the address where the billing information will be sent.
   - **Ship To Address**
     Enter the address information to ship the items to the customer. Select **Will Call** if the customer will pick up the items.
     To look up the **Bill To Address** or **Ship To Address** information, follow these steps:
     1. On the Form toolbar, click **Look Up Address**.
     2. In the **Look Up Address** dialog box, select the **Bill To Address** check box, the **Ship To Address** check box, or both.
     3. Click **Lookup**.
     4. In the list of records, select the record you want, and then click **OK**.

9. On the **Administration** tab, enter information or observe any noted restrictions or requirements as needed:

   - **Owner**
     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
   - **Status Reason**
     Select the status of the item.
   - **Source Campaign**
     The campaign record that appears in this field is automatically assigned when you convert a quote associated with a campaign into an order.
   - **Opportunity**
     Select an opportunity if you want to associate this item with an opportunity.
   - **Quote**
     Select a quote if you want to associate this order with a quote.

10. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
11. Click **Save** or **Save and Close**.

▸ Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

– OR –

If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Tip

When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Close an active quote

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Important: You cannot edit a closed quote record.

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.
2. Open the active quote that you want to close.
3. On the **Actions** menu, click **Close Quote**.
   - **Status Reason**
     Select the status of the item. The choices available by default are **Lost**, **Canceled**, and **Revised**.
   - **Close Date**
     Enter the date that the quote was closed.
   - **Create a revised quote**
     You may be closing the quote because you need to create a new, revised quote. If this is the case, select this option.

     – OR –

     Do not revise this quote
     If you do not want to create a revised quote, select this option.
   - **Close the associated opportunity**
     If this quote is associated with an opportunity, you can select **Close the associated opportunity** to close the opportunity.

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.
- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Work with Orders

When a customer is ready to purchase a product, you can create an order to record the potential sale.

You can delete an order only when it is active. Closed orders are read-only and cannot be deleted. Open the order and view the **Status** field if you are not sure about the status of your selection.

Create or edit an order

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Typically, you convert a quote that is won into an order. However, you can also use Microsoft Dynamics CRM to create an order that does not originate from a quote.

1. In the Navigation Pane, click **Sales**, and then click **Orders**.
2. On the Actions toolbar, click **New**, or open the record that you want to edit.
3. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:
   - **Order ID**

     This information is automatically created. System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.
   - **Name**
     You must enter a name with a length of 100 characters or fewer. The information should be meaningful and unique. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks. By default, these records are sorted by Name in the records list.
   - **Customer**
     You must search for and select an account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.

- **Currency**
  Select the currency in which the order will be calculated.
- **Price List**
  Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Detail Amount**
  This box is read-only and automatically calculates the sum of all existing quote, order, or invoice line items, which includes products and write-in products.
- **Order Discount (%)**
  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).
- **Order Discount**
  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).
- **Freight Amount**
  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).
- **Total Tax**
  The total tax is calculated when you click **Recalculate** or when you click **Save**.
- **Total Amount**
  The total amount is calculated when you click **Recalculate** or when you click **Save**.
- **Prices Locked**

  This check box is read-only. You set **Prices Locked** by clicking the **Actions** menu, and then click **Lock Pricing**. Alternatively, you disable **Prices Locked** by clicking the **Actions** menu, and then clicking **Use Current Pricing**.

  More information: Completing Sales Transactions

4. On the **Shipping** tab, enter all the information you have available and observe any noted restrictions or requirements.
   You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
   If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.
5. On the **Addresses** tab, enter all the information that you have available in the following sections:
   - **Bill To Address**
     Enter the address where the billing information will be sent.

- **Ship To Address**
  Enter the address information to ship the items to the customer. Select **Will Call** if the customer will pick up the items.
  To look up the **Bill To Address** or **Ship To Address** information, follow these steps:
  1. On the Form toolbar, click **Look Up Address**.
  2. In the **Look Up Address** dialog box, select the **Bill To Address** check box, the **Ship To Address** check box, or both.
  3. Click **Lookup**.
  4. In the list of records, select the record you want, and then click **OK**.

6. On the **Administration** tab, enter information or observe any noted restrictions or requirements as needed:
   - **Owner**
     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
   - **Status Reason**
     Select the status of the item.
   - **Source Campaign**
     The campaign record that appears in this field is automatically assigned if the order is converted from a quote associated with a campaign. You cannot assign a source campaign to completely new orders.
   - **Opportunity**
     Select an opportunity if you want to associate this item with an opportunity.
   - **Quote**
     Select a quote if you want to associate this order with a quote.
7. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
8. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated

records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Tip

When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Note

You must manually enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.

Add or remove a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   – OR –

   In the Navigation Pane, click **Sales**, and then click **Orders**.

   – OR –

   In the Navigation Pane, click **Sales**, and then click **Invoices**.

2. In the list of quotes, orders or invoices, open the record you want to add a contact to.
3. Under **Details**, click **Other Contacts**.
4. On the Actions toolbar, click **Add Existing Contact**.
5. In the **Look Up Records** dialog box, search for and select the contact records you want to add to the quote, order or invoice, and then click **OK**.
6. Click **Save** or **Save and Close**.

Tip

If you cannot locate the contact you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Note

To remove a contact from a quote, order, or invoice, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the contact or contacts you want to remove, and then on the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Lock or unlock the price for an order or invoice

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

To determine whether your order or invoice is using Prices Locked, view the **Prices Locked** check box on the **General** tab of the Invoice or Order form. If the **Prices Locked** check box is not selected, Use Current Pricing is enabled.

Note that this check box is read-only. You cannot enable or disable Prices Locked by clicking the **Prices Locked** check box on the **General** tab.

1. In the Navigation Pane, click **Sales**, and then click **Orders** or **Invoices**.
2. Open the order or invoice that you want.
3. To enable Prices Locked, on the **Actions** menu, click **Lock Pricing**.

   – OR –

   To enable Use Current Pricing, on the **Actions** menu, click **Use Current Pricing**.

Create an invoice from an order

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

In Microsoft Dynamics CRM, you can quickly generate an invoice based on the information that is in an order.

1. In the Navigation Pane, click **Sales**, and then click **Orders**.
2. Open the record that you want.
3. On the Actions toolbar, click **Create Invoice**.
4. On the **General** tab, make the changes that you want in the following boxes:

   - **Invoice ID**
     This information is automatically created. System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.
   - **Name**
     You must enter a name with a length of 100 characters or fewer. The information should be meaningful and unique. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks. By default, these records are sorted by Name in the records list.
   - **Customer**
     You must search for and select an account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.

- **Currency**
  Select the currency in which the invoice will be calculated.
- **Price List**
  Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Invoice Discount (%)**
  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).
- **Invoice Discount**
  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).
- **Pre-Freight Amount**
  This box is read-only and automatically calculates a subtotal based on the detail amount and any discounts.
- **Freight Amount**
  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).
- **Total Tax**
  The total tax is calculated when you click **Recalculate** or when you click **Save**.
- **Total Amount**
  The total amount is calculated when you click **Recalculate** or when you click **Save**.
- **Prices Locked**

  This check box is read-only. You set **Prices Locked** by clicking the **Actions** menu, and then click **Lock Pricing**. Alternatively, you disable **Prices Locked** by clicking the **Actions** menu, and then clicking **Use Current Pricing**.

  More information: Completing Sales Transactions

5. On the **Shipping** tab, enter all the information you have available and observe any noted restrictions or requirements.
   You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
   If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.
6. On the **Addresses** tab, enter all the information that you have available in the following sections:
   - **Bill To Address**
     Enter the address where the billing information will be sent.

- **Ship To Address**
  Enter the address information to ship the items to the customer. Select **Will Call** if the customer will pick up the items.
  To look up the **Bill To Address** or **Ship To Address** information, follow these steps:
  1. On the Form toolbar, click **Look Up Address**.
  2. In the **Look Up Address** dialog box, select the **Bill To Address** check box, the **Ship To Address** check box, or both.
  3. Click **Lookup**.
  4. In the list of records, select the record you want, and then click **OK**.

7. On the **Administration** tab, enter information or observe any noted restrictions or requirements as needed:
   - **Owner**
     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
   - **Status Reason**
     Select the status of the item.
   - **Opportunity**
     Select an opportunity if you want to associate this item with an opportunity.
   - **Order**
     Select an order if you want to associate this invoice with an order.
8. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
9. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Tip

When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Close an order

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You close an order by either fulfilling the order or canceling the order. Products or services that are shipped are fulfilled. Conversely, products or services that are not shipped should be canceled.

1. In the Navigation Pane, click **Sales**, and then click **Orders**.
2. In the **Orders** list, open the order that you want.
3. On the **Actions** menu, click **Fulfill Order** if the order is fulfilled, or click **Cancel Order** if the order is canceled.
4. In the dialog box, enter information in the following boxes, and then click **OK**:
   - **Status Reason**
     Select the status of the item.
   - **Date Fulfilled** or **Cancel Date**
     Select the date that the order was fulfilled or canceled.
   - **Description**
     Enter a description of the order fulfillment or cancellation.

Important

You cannot update or change an order after it has been closed. Additionally, you cannot update or change an order that been partially or completely fulfilled.

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.
- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Work with Invoices

When a customer has agreed to the terms of an order for one or more of your products, you can create an invoice to record the upcoming sale.

You can delete an invoice only when it is active. Closed invoices are read-only and cannot be deleted. Open the invoice and view the **Status** field if you are not sure about the status of your selection.

Create or edit an invoice

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

Typically, you convert an order into an invoice. However, in Microsoft Dynamics CRM, an invoice can be created that does not originate from an order.

1. In the Navigation Pane, click **Sales**, and then click **Invoices**.
2. On the Actions toolbar, click **New**, or open the record that you want to edit.
3. On the **General** tab, enter information or observe any noted restrictions or requirements as needed:
   - **Invoice ID**
     This information is automatically created. System administrators can set the auto-numbering format for this ID from the **Administration** page, under **Set Auto-Numbering**.
   - **Name**
     You must enter a name with a length of 100 characters or fewer. The information should be meaningful and unique. You can use accent marks when you enter data, for example, in a customer's name. Your ability to sort and find information is not affected by these accent marks. By default, these records are sorted by Name in the records list.
   - **Customer**
     You must search for and select an account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.

- **Currency**
  Select the currency in which the invoice will be calculated.
- **Price List**
  Search for and select the price list that you want. Price lists are created in the product catalog. At least one price list must exist in the product catalog before you can select it. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

In the **Totals** area, enter all the information you have available. If you are adding a discount, you can add a percentage discount, a monetary discount amount, or both.

- **Detail Amount**
  This box is read-only and automatically calculates the sum of all existing quote, order, or invoice line items, which includes products and write-in products.
- **Invoice Discount (%)**
  This number represents a percentage of the total amount (not including freight charges) that will be discounted from the total amount. This must be a number between 0.00 and 100.00. You can use a decimal point, but you cannot use a percent sign (%).
- **Invoice Discount**
  This number represents a whole monetary amount that will be discounted from the total amount. This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($), euro (€), or yen (¥).
- **Pre-Freight Amount**
  This box is read-only and automatically calculates a subtotal based on the detail amount and any discounts.
- **Freight Amount**
  This must be a number between 0.00 and 100,000,000,000.00. You can use commas and a decimal point, but you cannot use a currency symbol, such as dollar ($) or euro (€).
- **Total Tax**
  The total tax is calculated when you click **Recalculate** or when you click **Save**.
- **Total Amount**
  The total amount is calculated when you click **Recalculate** or when you click **Save**.
- **Prices Locked**

  This check box is read-only. You set **Prices Locked** by clicking the **Actions** menu, and then click **Lock Pricing**. Alternatively, you disable **Prices Locked** by clicking the **Actions** menu, and then clicking **Use Current Pricing**.

  More information: Completing Sales Transactions

4. On the **Shipping** tab, enter all the information you have available and observe any noted restrictions or requirements.
   You must enter the date in the format your organization has set for dates. For example, 01/01/2006 or 31.12.2005.
   If you omit leading zeros in a date, Microsoft Dynamics CRM will add them automatically. For example, when you type 1/1/06, Microsoft Dynamics CRM will display it as 01/01/2006, if that is the date format of your organization.
5. On the **Addresses** tab, enter all the information that you have available in the following sections:

- **Bill To Address**
  Enter the address where the billing information will be sent.
- **Ship To Address**
  Enter the address information to ship the items to the customer. Select **Will Call** if the customer will pick up the items.
  To look up the **Bill To Address** or **Ship To Address** information, follow these steps:
  1. On the Form toolbar, click **Look Up Address**.
  2. In the **Look Up Address** dialog box, select the **Bill To Address** check box, the **Ship To Address** check box, or both.
  3. Click **Lookup**.
  4. In the list of records, select the record you want, and then click **OK**.

6. On the **Administration** tab, enter information or observe any noted restrictions or requirements as needed:
   - **Owner**
     This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
   - **Status Reason**
     Select the status of the item.
   - **Opportunity**
     Select an opportunity if you want to associate this item with an opportunity.
   - **Order**
     Select an order if you want to associate this invoice with an order.
7. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
8. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings**

and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Note

You must manually enter the tax amount when you add a product to a quote, order, or invoice. Microsoft Dynamics CRM does not automatically calculate tax for individual products. However, the total tax is calculated automatically based on the sum of the tax amounts for all of the individual products in a quote, order, or invoice.

Tip

When the **Look Up Records** dialog box is open, if the record you need doesn't exist, click **New**, and create the record.

Add or remove a contact

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

1. In the Navigation Pane, click **Sales**, and then click **Quotes**.

   – OR –

   In the Navigation Pane, click **Sales**, and then click **Orders**.

   – OR –

   In the Navigation Pane, click **Sales**, and then click **Invoices**.

2. In the list of quotes, orders or invoices, open the record you want to add a contact to.
3. Under **Details**, click **Other Contacts**.
4. On the Actions toolbar, click **Add Existing Contact**.
5. In the **Look Up Records** dialog box, search for and select the contact records you want to add to the quote, order or invoice, and then click **OK**.
6. Click **Save** or **Save and Close**.

Tip

If you cannot locate the contact you want to add, you might need to create it. To do this, in the **Look Up Records** dialog box, click **New** and then complete the form.

Note

To remove a contact from a quote, order, or invoice, follow steps 1, 2, and 3 above to navigate to the appropriate area. Select the contact or contacts you want to remove, and then on the Actions toolbar, click **More Actions**, and then click **Remove**. In the confirmation message, click **OK**.

Lock or unlock the price for an order or invoice

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

To determine whether your order or invoice is using Prices Locked, view the **Prices Locked** check box on the **General** tab of the Invoice or Order form. If the **Prices Locked** check box is not selected, Use Current Pricing is enabled.

Note that this check box is read-only. You cannot enable or disable Prices Locked by clicking the **Prices Locked** check box on the **General** tab.

1. In the Navigation Pane, click **Sales**, and then click **Orders** or **Invoices**.
2. Open the order or invoice that you want.
3. To enable Prices Locked, on the **Actions** menu, click **Lock Pricing**.

   – OR –

   To enable Use Current Pricing, on the **Actions** menu, click **Use Current Pricing**.

Close an invoice as paid or canceled

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

You close an invoice either by canceling the invoice or setting the invoice status as paid.

1. In the Navigation Pane, click **Sales**, and then click **Invoices**.
2. Open the record that you want.
3. On the **Actions** menu, click **Invoice Paid** if the invoice is paid, or click **Cancel Invoice** if the invoice is canceled.
4. In the **Paid Invoice** or **Cancel Invoice** dialog box, select the reason in the **Status Reason** list.
5. Click **OK**.

Default sales reports

The following sales reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Account Distribution Report
  Use this report to identify patterns in your top revenue-generating accounts. The report displays two charts. The earned revenue chart displays a chart of the earned revenue grouped by a market facet, such as product, territory, or industry. The accounts count chart, displays the amount of earned revenue using the same grouping as the earned revenue chart.
- Account Overview Report
  Use this report to obtain a one-page overview of everything occurring with an account. The report displays a profile of the account, contact information, and summaries of opportunities and case activities.
- Account Summary Report
  Use this report to determine historically what has occurred with an account. This report also displays what is scheduled to occur in the future. The report displays a chronological summary for an account, including sales and service activities, notes, and records.
- Activities Report
  Use this report to identify patterns in activities. Activities can be grouped by owner or activity type, or by the record the activity is regarding.
- Competitor Win Loss Report
  Use this report to compare how your sales team performs against your competitors. The report displays a list of competitors, with data on open, closed, won, and lost opportunities for each.
- Invoices Report
  Use this report to print invoices.
- Invoice Status Report
  Use this report to view your accounts receivable. The chart displays invoices grouped by status.
- Lead Source Effectiveness Report
  Use this report to compare how effective your lead sources are at generating quality opportunities. The report lists the percentage of qualified leads, and leads that generate revenue for each lead category.
- Neglected Leads Report
  Use this report to identify any leads that have not been contacted. The report displays a chart of leads that have had no associated activities or notes during a specified time period.
- Orders Report
  Use this report to print orders.
- Quotes Report
  Use this report to print quotes.
- Sales Pipeline Report
  Use this report to see anticipated potential sales. The report displays a chart of potential sales grouped by user, sales territory, customer territory, date, products, rating, or sales stage.
- Sales History Report
  Use this report to view a history of sales performance by sales representative. The report displays a chart of both lost and earned revenue.
- Neglected Accounts Report

Use this report to identify accounts that have not been contacted recently. The report displays a chart with accounts that have had no activities completed in a specified number of days.

- Products by Account Report
  Use this report to see which products are used by an account. For each account, the report lists the associated products.
- Products by Contact Report
  Use this report to see which products are used by a contact. For each contact, the report lists the associated products.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Note

This topic documents the list of default reports as they were shipped. If this list differs from the reports that are available to you, contact your report administrator or system administrator for information about the customized reports.

Chapter 3: Marketing

This chapter discusses the marketing module in Microsoft Dynamics CRM.

Running Campaigns

Planning Campaigns

Campaigns are containers for all of the information, planning tasks, and campaign activities you need to manage for the marketing campaigns. You can use campaigns to manage the end-to-end process of a complete marketing campaign. Campaigns include extensive tracking features, including detailed financial information, reports, and multiple marketing lists. Campaigns can also include multiple planning tasks and campaign activities required to coordinate all the resources that are needed for a campaign.

Creating campaigns

When you create a new campaign or a campaign template, you can add strategic campaign information, such as:

- Budgets and expenses
- Promotion codes
- Target products
- Marketing collateral, including sales literature
- Target marketing lists

Note

Campaigns and campaign templates include the same features. You can create a completely new campaign template, or you can copy an existing campaign as a template. To use a campaign template as the basis of a new campaign, you copy the campaign template.

Campaigns can include whatever planning tasks you want to perform before you launch the campaign, as well as the campaign activities you want to manage as part of the campaign.

Running campaigns

Because campaigns are primarily containers for tasks and activities, you do not need to "launch" a campaign from within Microsoft Dynamics CRM. Launching a campaign simply occurs when you perform your first campaign activity.

To have staff in your organization perform the campaign activities you have created, you must distribute the campaign activity. Distributing activities from a campaign enables the owners of the records to take action on the related activities (such as making a phone call or personalizing a letter before sending it). During the campaign, you can create a campaign response whenever a potential customer shows interest as a result of the campaign.

When your campaign is over, you do not need to close the campaign record the way you would close an individual task or activity. In the same way that a campaign begins with the first campaign activity, a campaign ends when the last campaign activity has been completed.

Differences between campaigns and quick campaigns

In contrast to campaigns, quick campaigns do not include many of the same tracking and reporting features, and support only one type of activity for each quick campaign. However, you can use quick campaigns to distribute a single activity automatically to an ad-hoc selection of marketing lists, accounts, contacts, or leads.

Campaigns can represent an organization's marketing efforts over an extended period of time. The effects of a quick campaign are immediate.

Another key difference between campaigns and quick campaigns is in how marketing lists work with quick campaigns. Using quick campaigns, you can still select one or more marketing lists and create activities for all of the records in those lists. However, Microsoft Dynamics CRM does not associate the marketing list itself with the quick campaign.

Instead, activities are created only for the accounts, contacts, or leads that were included in the marketing list or lists when you selected them.

Work with Campaigns and Campaign Templates

Use this list to work with campaigns and campaign templates.

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

The only difference between campaigns and campaign templates is in how you save the record. You can add planning tasks, campaign activities, marketing lists, sales literature, and products to both campaigns and campaign templates. Use a campaign to plan and track each of your marketing campaigns. Use campaign templates to create reusable groups of planning tasks and campaign activities for similar or recurring marketing campaigns.

Because campaigns serve as containers for the various items you can include in them, there is no need to close a campaign once all of the planning tasks and campaign activities have been completed.

Create or edit a campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. On the Actions toolbar, click **New**.
3. On the **General** tab, you must enter information in the following boxes:
   - **Name**
   - **Status Reason**
     To save the new campaign, you must select a status reason.

   Enter any other information that you have for this campaign. At a minimum, select a price list, which helps you determine the cost of your campaign compared to the revenue generated by the campaign.

   Microsoft Dynamics CRM automatically generates a campaign code when you save the new campaign. Because this code is automatically generated, it cannot be changed after you save the campaign.

4. On the **Financials** tab, enter any information that you have available in the following sections:
   - **Budget Allocated**
   - **Estimated Revenue**
   - **Miscellaneous Costs**

   You must enter numbers between 0.00 and 1,000,000,000.00.
   You can use commas and a decimal point, but you cannot use a currency symbol, such as the dollar ($), euro (€), or yen (¥).

The **Total Cost of Campaign Activities** and **Total Cost of Campaign** values are automatically calculated.

5. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
6. Click **Save** or **Save and Close**.

Note

All information that is displayed on the **Administration** tab is automatically generated. The **Owner** and **Modified By** boxes are populated with the name of the user who creates the account.

Create or edit a campaign template

You can create a campaign template by copying an existing campaign or creating a completely new campaign template.

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. To create a completely new template, on the Actions toolbar, click **New Template**.

   To copy an existing campaign as a template, open the campaign you want to copy. On the Standard toolbar, click **Actions** , and then click **Copy as Template**.

3. Fill out the campaign template form as you would for a campaign, and add items such as planning tasks, campaign activities, and marketing lists.
4. Click **Save** or **Save and Close**

Add a marketing list, sales literature, or product to a campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

After you create a campaign, add items that are associated with this campaign. You can add a target marketing list, products, sales literature, and related campaigns.

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign to which you want to add a list, product, or sales literature, and then:
   - If you want to add a marketing list, under **Marketing**, click **Target Marketing Lists**, and then on the Actions toolbar click **Add**.
   - If you want to add a product, under **Sales**, click **Target Products**, and then on the Actions toolbar click **Add Existing**.
   - If you want to add sales literature, under **Sales**, click **Sales Literature**, and then on the Actions toolbar click **Add Existing**.
   - If you want to add a related campaign, under **Marketing**, click **Related Campaigns**, and then on the Actions toolbar click **Add Existing**.
3. In the **Look Up Records** dialog box, in the **Look for** list, select the type of record you want to find.
4. Click **Save** or **Save and Close**.

Note

To verify that the item you selected was added to the campaign, reopen the campaign, and then under **Marketing**, click **Target Lists**, or under **Sales** click either **Target Products** or **Sales Literature**. The information that you added appears in the list.

Add a planning task to a campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign you want to add a task to.
3. Under **Details**, click **Planning Tasks**, and then on the Actions toolbar, click **New**.
4. In the **Subject** box, enter text that describes the task.

   In the box below, you can add specific details about how to complete the task.

5. If needed, specify a new owner for the record in the **Owner** box. This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
6. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
7. Click **Save** or **Save and Close**.

Add a campaign activity to a campaign or campaign template

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign or campaign template that you want to add an activity to.
3. Under **Details**, click **Campaign Activities**, and then on the Actions toolbar, click **New**.
4. Select the channel for the activity that you are creating.
5. In the **Type** box, select the option that describes the activity.
6. In the **Subject** box, enter text that describes the activity.

   In the box below, you can add specific details about how to complete the task.

7. If needed, specify a new owner for the record in the **Owner** box. Click the **Lookup** button to search for another owner.

8. In the **Outsource Vendors** box, click the **Lookup** button to select a vendor that is involved in the activity.
9. In the **Scheduled Start** and **Scheduled End** boxes, select the start and end dates for the activity.

   The end date that you select is displayed in the **Due Date** column in **Activities** in the **Workplace**.

10. In the **Budget Allocated** box, enter the amount designated for the campaign activity.
11. Select the appropriate priority level in the **Priority** box.
12. Under the **Anti-Spam Setting**, select the number of days you want to pass before a marketing list member is contacted again.
13. Click **Save** or **Save and Close**.

Important

After you create a campaign activity, you must distribute the activity. To distribute your new campaign activity, on the Actions toolbar, click **Distribute Campaign Activity**.

Notes

- You can only distribute mail merge campaign activities to marketing lists that all contain the same type of record. For example, if one marketing list contains accounts and a second marketing list contains leads, the mail merge campaign activity will fail. Create a separate mail merge campaign activity for each group of marketing lists with the same record type.
- Microsoft Dynamics CRM applies a date and time stamp to any accounts, contacts, or leads in a marketing list in which you have specified contact restrictions using the **Anti-Spam Setting** option. You will not be able to distribute activities to these accounts, contacts, or leads for the exact amount of time you have specified.

Create or edit a campaign response

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

There are four ways to create new campaign responses in Microsoft Dynamics CRM. More information: Understanding Campaign Responses

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign you want to add a campaign response to.
3. Under **Details**, click **Campaign Responses**, and then on the Actions toolbar, click **New**, or open the campaign response that you want to edit.
4. On the **Campaign Response** tab, enter information or observe any noted restrictions or requirements as needed.

   - **Parent Campaign**
     This information is automatically entered based on the name of the campaign you selected to add this response to.

- **Response Code**
  Select an option from the list that reflects the type of response provided by the customer.
- **Customer**
  If an existing customer provided the response, then you can link that customer record to the response. To locate and specify a customer, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records. If the customer record does not exist, you can click **New** to create a new customer record.
- **Outsource Vendor**
  You can specify an account or contact as the vendor who provided the response information. To locate and specify an outsource vendor, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records or to add a new record.
- **Originating Activity**
  You can link the campaign response to an activity, such as a phone call that you or someone else in your organization recorded. To locate and specify an activity, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records.
- **Subject**
  Type in the subject of the campaign response.
- **Owner**
  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

5. Click **Save** or **Save and Close**.

Tip

You can also create a campaign response from the Activities area. To do this, in the Navigation Pane, click **Workplace**, and then under **My Work**, click **Activities**. On the Actions toolbar, click **New** and then in the **New Activity** dialog box, click **Campaign Response**. If you create a response from this area, you must specify a value for the **Parent Campaign**.

Default marketing reports

The following marketing reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Campaign Activity Status Report
  Use this report to track a campaign. The report displays a summary for one campaign, including planned and actual time parameters, parent campaign details, and definition status.
- Campaign Comparison Report
  Use this report to identify your most and least successful campaigns. The report compares two campaigns based on parameters such as cost effectiveness and number of responses.
- Campaign Performance Report
  Use this report to track the progress and status of your campaigns. The report provides a detailed view, including all the dates, targets, definitions, responses, and financial returns from each campaign.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Understanding Quick Campaigns

You can use a quick campaign to communicate with an ad-hoc list of customers (accounts, contacts, or leads). More information: Work with Quick Campaigns

Selecting recipients for the quick campaign

There are three ways you can select the list of recipients for your quick campaign:

- Select the accounts, contacts, or leads directly.
- Select one or more marketing lists.
- Do a search in Advanced Find and create a quick campaign from the resulting list of records.

Creating the quick campaign

When you create your new quick campaign, you can choose whether you want to own the activities that you distribute, or whether each of the users who own the records in your quick campaign should own the distributed activities. If you use the quick campaign to create and distribute e-mail activities, you can also choose whether you want Microsoft Dynamics CRM to automatically send the e-mail messages and whether the corresponding e-mail activities should be closed.

After you finish configuring your quick campaign, Microsoft Dynamics CRM immediately creates and distributes the activity you specified for all of the customers you selected.

Working with the completed quick campaign record

After you have used a quick campaign to quickly distribute activities, you can use the quick campaign record to:

- Collect, view, and take action on campaign responses.
- View the activities created from the quick campaign and the current status on those activities.
- Close one or more open activities created from the quick campaign.
- View the records for the customers who were contacted.
- View the records for customers who could not be contacted and an explanation for why these customers were not included in the quick campaign.

Differences between campaigns and quick campaigns

In contrast to campaigns, quick campaigns do not include many of the same tracking and reporting features, and support only one type of activity for each quick campaign. However, you can use quick campaigns to distribute a single activity automatically to an ad-hoc selection of marketing lists, accounts, contacts, or leads.

Campaigns can represent an organization's marketing efforts over an extended period of time. The effects of a quick campaign are immediate.

Another key difference between campaigns and quick campaigns is in how marketing lists work with quick campaigns. Using quick campaigns, you can still select one or more marketing lists and create activities for all of the records in those lists. However, Microsoft Dynamics CRM does not associate the marketing list itself with the quick campaign. Instead, activities are created only for the accounts, contacts, or leads that were included in the marketing list or lists when you selected them.

Additional quick campaign features in Microsoft Dynamics CRM for Outlook

Some quick campaign features are available only in Microsoft Dynamics CRM for Outlook :

- Compose personalized e-mail messages using a template.

- Send messages in simple HTML or rich text format with the mail merge feature.

Work with Quick Campaigns

Although you can print or export the quick campaign list and delete quick campaigns you no longer need, you must select records in other lists to create a new quick campaign.

Caution: Deleting a quick campaign record deletes all of the activities created by the quick campaign, even if those activities were not yet complete.

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

From a list of records, including the results of a search You can run a quick campaign from any list of accounts, contacts, or leads.

a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

- **For Selected Records**
  Select this option if you have selected one or more records in the list.
- **For All Records on Current Page**
  Select this option to include all records on the page for the quick campaign activity.
- **For All Records on All Pages**
  Select this option to include all records on all pages for the quick campaign activity.

From the **Marketing Lists** list You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Select the marketing list or marketing lists for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

From a marketing list You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

b. Double-click the marketing list for which you want to create a quick campaign.

c. On the Actions toolbar, click **Create Quick Campaign**.

4. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

Notes

- You cannot add additional records to a quick campaign after you have created it.
- In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). This choice affects who can see and take action on an activity. For example, if you were creating a phone call activity for all of the sales representatives, you could select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative could then see the activity and take action on it. However, if you were creating a large number of e-mail activities that Microsoft Dynamics CRM would perform automatically, you could assign the e-mail activity to yourself instead of the record owners.
- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Managing Campaign Activities and Planning Tasks

- Using Microsoft Dynamics CRM, you can create and track the various planning tasks and campaign activities that you have to complete for your marketing campaign to be successful.

Examples of planning tasks and campaign activities

- For a new product launch campaign, examples of planning tasks might include "Identify collateral pieces to be created" and "Review advertising copy."
- Campaign activities form the central part of your campaign, and can include a range of Microsoft Dynamics CRM activities, such as phone calls, letters via mail merge, or an e-mail blast.

Including campaign-specific information in campaign activities

- You can specify the campaign activity's priority and the amount of budget your organization wants to allocate to the activity. For example, if you have created a letter activity, the budget might include the cost of paper, printing, envelopes, and postage.
- This information can help you determine the overall value of your campaign. When the activity has been completed, you can update the campaign activity record with the actual costs, which can help guide you in planning future campaign activities.

Distributing campaign activities

- After you have created a campaign activity, you can distribute it if you have a marketing list associated with the campaign. Each person in your organization to whom the activity was assigned can then complete the activity.
- For example, if you want your sales staff to personally contact each of their customers on the marketing list and invite them to your opening night, you can create a phone call campaign activity and distribute it. When you distribute an activity, you can designate who should complete the activity. For e-mail activities, you can also choose to send the e-mail messages automatically.
- **Note**
- Fax, letter, and e-mail campaign activities that take advantage of the mail merge feature can be completed only by using Microsoft Dynamics CRM for Outlook.

Understanding Campaign Responses

In Microsoft Dynamics CRM, campaign responses are records of the communication you receive from potential customers in response to a specific marketing campaign. You can record or capture responses to various marketing campaign activities to ensure that the right follow-up happens. There are four ways to create campaign responses:

- Record campaign responses manually.
- Convert an existing activity to a campaign response.
- Automatically generate campaign responses.
- Import responses from a file, such as a Microsoft Office Excel workbook.

Capturing campaign responses in Microsoft Dynamics CRM helps to make sure that your team is aware that a customer has responded. Knowing this enables you to follow up appropriately. By running reports that contain the campaign response data that you have captured in Microsoft Dynamics CRM, you can measure the success of specific activities based on their response rates.

Note

Campaign responses are *records* of the responses you have *received* from potential customers, *not* automated responses back *to* your potential customers. Understanding this difference is especially important when you work with automatically generated campaign responses for e-mail activities. In other words, campaign responses for e-mail activities are not sent back to the people who responded to your e-mail; instead, the campaign response only tracks that the potential customer responded.

Creating New Campaign Responses

Sales and Marketing teams can use Microsoft Dynamics CRM to manually record customer responses as campaign response records, based on a direct marketing activity. You can create responses manually by first creating an activity and then converting it, or by creating a new campaign response within a campaign record. More information: Work with Campaigns and Campaign Templates

Converting Activities to Campaign Responses

When a potential customer responds to an activity created for them as part of a marketing campaign, you can convert the corresponding activity, such as a phone call, e-mail, or appointment, to a campaign response. To convert an activity, it must have been saved and have had no modifications since it was last saved. More information: Campaign Activity Form

Note

You create campaign responses from activities at the same time that you convert an individual activity to an opportunity.

Automatically Creating Campaign Responses

For e-mail activities you have included in your campaign, you can also use Microsoft Dynamics CRM to generate the campaign responses automatically. When customers respond to e-mail activities, you can choose to have Microsoft Dynamics CRM create the corresponding campaign response records automatically.

Important

This option is available only if e-mail tracking is enabled. This is a setting your administrator can set. More information: Manage System Settings

Importing Campaign Responses

In addition to creating campaign responses within Microsoft Dynamics CRM, you can also create them outside the system and then import them. By importing campaign responses, you can capture a record of the responses received as part of campaign efforts performed outside Microsoft Dynamics CRM. For example, instead of hiring additional telesales representatives to handle the temporary increase in call volume during the product launch, you may outsource some of this work to a vendor. When you import the file, you can specify that it contains campaign responses. Each item in the file then becomes a campaign response in Microsoft Dynamics CRM.

Note

The minimum data that you must have to import a campaign response is the name of the parent campaign in Microsoft Dynamics CRM and a subject, such as "E-mail campaign result" or "Ayla Kol wants to place a bulk order".

Work with Campaign Responses

A campaign response is a record of the communication you receive from a potential customer in response to a specific campaign.

Create or edit a campaign response

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

There are four ways to create new campaign responses in Microsoft Dynamics CRM. More information: Understanding Campaign Responses

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign you want to add a campaign response to.
3. Under **Details**, click **Campaign Responses**, and then on the Actions toolbar, click **New**, or open the campaign response that you want to edit.
4. On the **Campaign Response** tab, enter information or observe any noted restrictions or requirements as needed.
    - **Parent Campaign**
      This information is automatically entered based on the name of the campaign you selected to add this response to.
    - **Response Code**
      Select an option from the list that reflects the type of response provided by the customer.
    - **Customer**
      If an existing customer provided the response, then you can link that customer record to the response. To locate and specify a customer, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records. If the customer record does not exist, you can click **New** to create a new customer record.
    - **Outsource Vendor**
      You can specify an account or contact as the vendor who provided the response information. To locate and specify an outsource vendor, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records or to add a new record.

- **Originating Activity**
  You can link the campaign response to an activity, such as a phone call that you or someone else in your organization recorded. To locate and specify an activity, select a record from a filtered list in the **Form Assistant** pane, or click **Lookup** to search for other records.
- **Subject**
  Type in the subject of the campaign response.
- **Owner**
  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.

5. Click **Save** or **Save and Close**.

Tip

You can also create a campaign response from the Activities area. To do this, in the Navigation Pane, click **Workplace**, and then under **My Work**, click **Activities**. On the Actions toolbar, click **New** and then in the **New Activity** dialog box, click **Campaign Response**. If you create a response from this area, you must specify a value for the **Parent Campaign**.

Copy a campaign response

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign that contains the campaign response that you want to copy.
3. Under **Details**, click **Campaign Responses**.
4. Open the campaign response that you want to copy.
5. On the **Actions** menu, click **Copy Campaign Response**.
6. A new campaign response form will open with the same information as the original campaign response. Make any changes as needed, such as changing the subject.
7. Click **Save** or **Save and Close**.

Convert campaign responses to leads or opportunities

You qualify a campaign response by converting it to another record, such as a lead, quote, order, or opportunity. You can also use the campaign response to convert an existing lead to an account. Converting a campaign response automatically closes it.

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.

2. Open the campaign that contains responses you want to qualify.
3. Under **Details**, click **Campaign Responses**.
4. Open the individual campaign response that you want to qualify.
5. On the Form toolbar, click **Convert Campaign Response**.
6. In the **Close and Convert the Response** dialog box, under **Close response and convert into a record**, select from the following options:
   - If you want to create a new lead record, click **Create New Lead**.
   - If you want to use the campaign response to convert an existing lead to an account or contact record, click **Convert an existing lead**. You can click the **Lookup** button to search for the existing lead.
   - If you want to create an opportunity, quote, or order for an existing customer, click **Create new record for a customer**, click the button for the new record you want to create, and then click the **Lookup** button to search for and select an existing account or contact record.

     If you do not have a record for the existing customer, you can click **New** in the **Look Up Records** dialog box to create the record now.
7. Click **OK**.

Tips

- If you want to view the new records you have created, select the **Open newly created records** check box. After you click **OK**, forms for any new leads, quotes, orders, or opportunities open, and you can fill out additional information about each new record.
- If you want to disqualify the campaign response, you can close it without converting it to another record.

Close a campaign response

You disqualify a campaign response by closing it without converting it to another record.

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign that contains responses you want to disqualify.
3. Under **Details**, click **Campaign Responses**.
4. Select the campaign responses that you want to disqualify.
5. On the Actions toolbar, click **More Actions**, and then click **Close Campaign Response**.
6. Select an appropriate status for the disqualified campaign response, and then click **OK**.

Reactivate a campaign response

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing**, and then click **Campaigns**.
2. Open the campaign that contains the campaign response that you want to reactivate.
3. Open the closed campaign response that you want to reactivate.
4. On the **Actions** menu, click **Reactivate Campaign Response**.
5. In the confirmation message, click **OK**.
6. Click **Save** or **Save and Close**.

Default marketing reports

The following marketing reports are available:

This topic shows you how to use the different reports. You also can find more information when you generate a report, click **Help**, and then click **Help on This Page**.

- Campaign Activity Status Report
  Use this report to track a campaign. The report displays a summary for one campaign, including planned and actual time parameters, parent campaign details, and definition status.
- Campaign Comparison Report
  Use this report to identify your most and least successful campaigns. The report compares two campaigns based on parameters such as cost effectiveness and number of responses.
- Campaign Performance Report
  Use this report to track the progress and status of your campaigns. The report provides a detailed view, including all the dates, targets, definitions, responses, and financial returns from each campaign.

If the default reports don't provide the information you need, try creating an Advanced Find search, and exporting the results to Microsoft Office Excel.

Using Marketing Lists

Creating and Managing Marketing Lists

In Microsoft Dynamics CRM, marketing lists are groups of accounts, contacts, or leads filtered by criteria that you specify. You can associate marketing lists with campaigns, create quick campaigns for the records in one or more marketing lists, and export marketing lists to Microsoft Office Excel.

Note

Marketing lists can contain only one type of record, such as accounts, contacts, or leads.

Adding members to marketing lists

There are several ways you can add members to a marketing list:

- **Look up.** Add members individually or as a group using the Lookup feature. For example, find and add a specific contact, or add all contacts.
- **Advanced Find.** Add members that match an Advanced Find query. For example, find and add only contacts with addresses in California, Oregon, and Washington.
- **Import.** Add members when you import accounts, contacts, or leads from an external file. For example, a list of leads from a telesales vendor saved in a Microsoft Office Excel workbook.

Qualifying marketing list members

After you create a marketing list and add members to it, you can further qualify list members and remove members that do not match specific criteria:

- Remove members that match an Advanced Find query. For example, find and remove all leads older than two years.
- Remove members that do *not* match an Advanced Find query. For example, keep only the accounts with no activity in the last six months and remove all others.

Managing marketing lists

In addition to adding marketing lists to campaigns and managing the members of a marketing list, you can also manage the lists themselves:

- **Delete marketing lists you no longer need.** Deleting a marketing list does not remove the accounts, contacts, or leads that were in that list.
- **Merge marketing lists.** By copying members of one marketing list to another list, you can merge the two lists.
- **Activate or deactivate a marketing list.** Inactive marketing lists do not appear in the default view for marketing lists. After you have deactivated a marketing list, you can activate it again if you need to.

Work with Marketing Lists

Marketing lists are lists of accounts, contacts, or leads that match a specific set of criteria.

Create or edit a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. On the Actions toolbar, click **New**, or open the marketing list that you want to edit.
3. On the **General** tab, you must enter information in the following boxes:
   - **Name**
   - **Member type**

   Enter any other information that you have for the list. If you want to prevent members from being added or removed from the list, set **Locked** to **Yes**.
4. On the **Notes** tab, click **Click here to enter a new note** and add any other information that applies to your marketing list.
5. Click **Save** or **Save and Close**.

Notes

- After you create a marketing list, you cannot change the member type.
- After you create an empty marketing list, you must add marketing list members before you can use the list.
- In **Cost**, you must enter a value with commas and decimal points only. Do not enter a currency symbol.

Activate a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

Before you can use a marketing list, you must activate it. After the list is activated, you can add or remove members, attach a file, create a follow up activity, use the list in a quick campaign, and add the list to a campaign.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Select the list you want to activate.
3. On the Actions toolbar, click **More Actions**, click **Activate**, and then click **OK**.

Add members to a marketing list

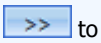
Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Open the marketing list to which you want to add members.
3. Under **Details**, click **Marketing List Members**.
4. On the Actions toolbar, click **Manage Members**.
5. In the **Manage Members** dialog box, click one of the following options, and then click **OK**:

Use Lookup to add members

a. In the **Search for records** box, type the first few letters of the name of the record to narrow your search, and then click the **Find** button .

b. In the list of records, click a record to select it, click the **Add Selected Records** button  to add the record to the **Selected records** list, and then click **OK**.

Use Advanced Find to add members

a. Select options to search for list members, and then click **Find**. More information: Find Things

b. To add all the records to the marketing list, click **Add all the members returned by the search to the marketing list**, and then click **Add to Marketing List**.

c. To add only some records to the list, select the records that you want, click **Add only the selected members to the marketing list**, and then click **Add to Marketing List**.

7. Click **Save** or **Save and Close**.

Tip

You can also add members to a marketing list from the Sales area. To do this, in the Navigation Pane, click **Sales**, and then click **Accounts**, **Contacts**, or **Leads**. Next, select the records you want to add to a marketing list, and on the Actions toolbar, click **More Actions**, and then click **Add to Marketing List**. Locate and select the marketing list you want to add the records to and then click **OK**. If necessary, you can create a new marketing list from the **Look Up Records** dialog box.

Note

Based on the type of list to which you are adding records, a member can be an account, contact, or lead. For example, if you open a leads list, you can add new leads to the member list, but you cannot add accounts or contacts.

Add members from one marketing list to another marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Open the marketing list from which you want to add members to another list.
3. Under **Details**, click **Marketing List Members**.
4. In the list of members, select the member you want to add to another list.
5. On the Actions toolbar, click **More Actions**, and then click **Add to Another Marketing List**.
6. In the **Look Up Records** dialog box, in the **Look for** box, type the information you are looking for, and then click the **Find** button .
7. Select the list you want to add the member to and click **OK**.
8. When the confirmation message appears, click **OK**.
9. Click **Save** or **Save and Close**.

Merge marketing lists

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. From the list, select the marketing list that contains the accounts, contacts, or leads that you want to merge into another marketing list.
3. On the Actions toolbar, on the **More Actions** menu, click **Copy to**.
4. In the **Look Up Records** dialog box, select the marketing list you want to merge members into, and then click **OK**.

Important

When you copy marketing list members, the marketing lists must both contain the same record type, such as all accounts or all contacts.

5. When the confirmation message appears, click **OK**.
6. Click **Save** or **Save and Close**.

Important

When you copy marketing list members, the marketing lists must both contain the same record type, such as all accounts or all contacts.

Remove members from a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Open the marketing list from which you want to remove members.
3. Under **Details**, click **Marketing List Members**.
4. In the marketing list, select the records you want to remove:
    - Select several records by pressing the CTRL key while you click each record.
    - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
    - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

Tip

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click **More Actions**, and then click **Remove from Marketing List**.

When the confirmation message appears, click **OK**.

Click **Save** or **Save and Close**.

Evaluate and remove members in a marketing list

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

2. Open the marketing list to which you want to remove members.
3. Under **Details**, click **Marketing List Members**.
4. On the Actions toolbar, click **Manage Members**.
5. In the **Manage Members** dialog box, click one of the following options, and then click **OK**:

Use Advanced Find to remove members

a. Select options to search for list members that you want to remove from your list, and then click **Find**. More information: Find Things
b. To remove all the records returned to the list, click **Remove all the members returned by the search from the marketing list**, and then click **Remove from Marketing List**.
c. To remove just the selected records from the list, select the records you want to remove, click **Remove only the selected members from the marketing list**, and then click **Remove from Marketing List**.

Use Advanced Find to evaluate members

a. Select options to search for and locate list members that you want to keep on your list, and then click **Find**. More information: Find Things
b. To keep all the records returned to the list, click **Keep all the members returned by search in the marketing list**, and then click **Update Marketing List**.
c. To keep just the selected records from the list, select the records you want to keep, click **Keep only the selected members in the marketing list**, and then click **Update Marketing List**.

7. Click **Save** or **Save and Close**.

Qualify or convert multiple records at once

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Sales Permissions

If you need to disqualify a group of leads or if you decide a group of leads are all good, you do not have to process them one by one. Instead, put the leads into a marketing list, and then disqualify the whole group or qualify them by converting the whole group into accounts, contacts, or opportunities all in one step.

1. Create a new marketing list.
    a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
    b. On the Actions toolbar, click **New**.
    c. In the **Name** box, type a name for the list, and in the **Member type** box, select **Lead**.
    d. Click **Save**.
2. Under **Details**, click **Marketing List Members**.
3. On the Actions toolbar, click **Manage Members**.
4. In the **Manage Members** dialog box, click **Use Advanced Find to add members**, and then click **OK**.

5. Create a query to find the list of leads to disqualify or convert.
    a. From the **Use Saved View** list, select **My Open Leads**.
    b. Add any additional criteria you need to the query.

Tip

If this query is one that you will use again, click **Save As**, and specify a name for the query.

6. To see the records, click **Find**.
7. Select one of the option buttons at the bottom of the window either to add all the leads returned by the search to the list or to add only selected leads to the list, and then click **Add to Marketing List**.
8. In the marketing list, select multiple lead records:
    - Select several records by pressing the CTRL key while you click each record.
    - Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
    - Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

Tip

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

After you select the leads you want to convert, on the **More Actions** menu, click **Convert Lead**.

In the **Convert Lead** dialog box, disqualify the leads, or select the record types to convert the leads to, and then click **OK**. The leads will still appear on your marketing list, but will no longer appear in your **My Open Leads** view.

Change the columns displayed for marketing list members

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

Although you cannot change the default view for marketing list members, you can create your own views with the columns you need, and export these views to Microsoft Office Excel if you need them for printing mailing labels or creating call lists.

1. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.
2. Open a marketing list.
3. Under **Details**, click **Marketing List Members**.
4. On the Actions toolbar, click **Manage Members**.
5. In the **Manage Members** dialog box, click **Use Advanced Find to evaluate members**.
6. On the Standard toolbar, click **Edit Columns**, and then in the **Common Tasks** area, click **Add Columns**.
7. Select the columns to add, and then click **OK** twice.
8. In the lower right corner of the window, click **Find**.

Tip

If you save the Advanced Find view to use later, to return to it from any marketing list, click **Manage Members**. When you select to add, remove, or evaluate members, you can select the saved view from the **View** list.

Create a quick campaign

Can I do this task?

This task requires permissions that are found in all default marketing security roles. More information about specific permissions and performing this task while offline: Marketing Permissions

You can use quick campaigns to create one type of activity for many accounts, contacts, or leads at once.

1. Select the records or list you want to run a quick campaign on, and then start the Create Quick Campaign Wizard.

From a list of records, including the results of a search You can run a quick campaign from any list of accounts, contacts, or leads.

a. Select the record or records for which you want to create a quick campaign. If you want to include all records on the current page or all records on all pages, then skip this step.

b. On the Actions toolbar, click **Create Quick Campaign** , and then click one of the following:

- **For Selected Records**
  Select this option if you have selected one or more records in the list.
- **For All Records on Current Page**

Select this option to include all records on the page for the quick campaign activity.

- **For All Records on All Pages**
  Select this option to include all records on all pages for the quick campaign activity.

- From the **Marketing Lists** list You can run a quick campaign on one or more marketing lists in the **Marketing Lists** list.

  a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

  b. Select the marketing list or marketing lists for which you want to create a quick campaign.

  c. On the Actions toolbar, click **Create Quick Campaign**, and then click **For Selected Records**.

- From a marketing list You can run a quick campaign on the accounts, contacts, or leads in any marketing list.

  a. In the Navigation Pane, click **Marketing** or **Sales**, and then click **Marketing Lists**.

  b. Double-click the marketing list for which you want to create a quick campaign.

  c. On the Actions toolbar, click **Create Quick Campaign**.

4. In the Create Quick Campaign Wizard, follow the instructions to create the quick campaign.

Notes

- You cannot add additional records to a quick campaign after you have created it.
- In the Create Quick Campaign Wizard, you can select who you want Microsoft Dynamics CRM to assign the activity to and whether Microsoft Dynamics CRM should perform the activity automatically for appropriate activities (such as sending e-mail messages). This choice affects who can see and take action on an activity. For example, if you were creating a phone call activity for all of the sales representatives, you could select the phone call activity, and then select **The owners of the records that are included in the quick campaign**. Each sales representative could then see the activity and take action on it. However, if you were creating a large number of e-mail activities that Microsoft Dynamics CRM would perform automatically, you could assign the e-mail activity to yourself instead of the record owners.
- Whether or not some activities are performed automatically depends on an option available to users who have the Organization Settings Write privilege. More information: Manage System Settings

Managing Customer Records

For information on managing leads, working with leads, managing accounts and contacts, and working with accounts and contacts, see the following references:

- Managing Leads
- Work with Leads
- Managing Accounts and Contacts
- Work with Accounts
- Work with Contacts

Chapter 4: Service

This chapter explains the service module in Microsoft Dynamics CRM.

Scheduling Services for Your Customers

Navigating the Service Calendar

You can use the Service calendar that is available in the Service area to schedule service activities and appointments for your organization. In the Service calendar, you can do all of the following tasks and activities:

- View your organization's daily, weekly, and monthly schedule of appointments and service activities.
- View work schedules and service activity schedules for a variety of resources.
- Create new appointments and schedule service activities.
- Change the status of an existing service activity.
- Search for conflicts in the schedule.

You cannot customize the Service calendar or change the default view with the application. However, you can use ISV.Config to change the colors of the time blocks.

Viewing Appointments and Service Activities

When you open the Service calendar, a list of resources is displayed on the left side of the calendar in alphabetical order. If there are more than 50 resources, click the arrows to view the next page of resources. You can also use the clickable Index at the bottom of the list to jump to a specific letter in the alphabet.

In the center of the page, a linear calendar displays the schedule for each resource. This display is divided into days and hours. Appointments and service activities appear in the linear calendar as labeled color blocks. Each color represents whether the time is for an appointment or a service activity, and also indicates the current status of the appointment or service activity.

Back to the top

Legend of Colors and Statuses

Color	Status
Service Activity Statuses	
	Requested
	Tentative
	Pending
	Reserved

	Arrived
	Canceled
	Completed
	No Show
	Busy
	Out of Office
	Not Working or Business Closure
Appointment Statuses	
	Canceled
	Completed

Viewing Details for Resources, Appointments, and Service Activities

You can view the resources, appointments, and service activities for anyone in your organization. In the **Type** list, select **Resources**, and then in the **View** list select the resource view. To find a specific resource, in the **Search for records** box, enter the first few letters of a name to search for a particular resource. To search for another record, clear the search criteria.

The linear calendar displays the resource's schedule. To view the details of any resource, appointment, or service activity, select the record in the list to the left of the calendar, and then at the very bottom of the calendar, under the **Zoom** scale, click the **Expand** button to expand the preview pane. You can also double-click a record to open it.

Note: The calendars in the Workplace area and in the Service area are not customizable.

Using the Calendar Pane to Change the Date Display

The Calendar Pane appears on the right side of the calendar. It can be collapsed or expanded.

- To collapse the Calendar Pane, click the **Collapse Calendar** button .
- To expand the Calendar Pane, click the **Expand Calendar** button .
- To change the date, click a date in the Calendar control. Use the arrows on either side of the month to change the month displayed.

- To change the range of dates, click a date on the Calendar control and then drag to the end date.

In the Calendar Pane, you can change the number of days that are displayed in the linear calendar by clicking any of the calendar options.

You can use the **Zoom** scale to change how much of the calendar is available to view. For example, you can set the calendar to display a whole week, or just a few hours. To view more of the calendar, click closer to the plus end of the scale. To view less of the schedule, click closer to the minus end of the scale. You can select specific date ranges to view in the **From** and **To** lists.

Service Calendar

Use the calendar to create, view, and edit service activities and appointments.

More information: Navigating the Service Calendar

Find the next available time

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available times for a service. This is the fastest way to schedule a service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
4. Click **Find Available Times**. The next available times are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.
5. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.
6. On the **Service Activity** form, enter any additional information about the service activity.
   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the

calendar in your **Workplace**.
You can save the service activity now, or continue to add information.

- **Customers**
  If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
- **Resources**
  Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
- **Location**
  You can enter an address or room number where the service activity will occur.
- **Show Time As**
  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
- **Site**
  Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
- **Notes**
  You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

7. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
8. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Find the next available time within a specific time period

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available time based on a specific date, or range of dates, within the next day, week, or month.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
4. Under **Requested Time**, select criteria for the times you want.
   - **Start Date**
     - To search for a time on a specific date, select **Specific Date**, and then enter the date you want.
     - To search within a range of dates, select **Range of Dates**, and then enter the **On or After** and **On or Before** dates. You can also select specific days of the week.
     - To search for times today, select **Today**.
     - You can also search for times based on dates relative to today, such as **Tomorrow**, **This Week**, or **Next Week**.
   - **Start Time**
     - To search for a specific time, select **Specific Time**, and then enter the specific time.
     - To search within a specific range of time, select **Range of Times**, and then enter the earliest and latest times you want the service activity to start.
     - You can also search for times based on the time of day, such as **Morning** or **Evening**.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
5. Click **Find Available Times**. The next available times are displayed.
6. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.

7. On the **Service Activity** form, enter any additional information about the service activity.

   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
     You can save the service activity now, or continue to add information.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Resources**
     Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Location**
     You can enter an address or room number where the service activity will occur.
   - **Show Time As**
     If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
   - **Site**
     Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
   - **Notes**
     You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

8. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
9. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Important

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.

- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Find an available time with specific criteria

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available time based on a set of specific criteria. For example, if the customer wants your head mechanic to work on his bicycle, you can search the head mechanic's schedule for the next available time.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
4. Click **Find Available Times**. The next available times in the selected resource's schedule are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.
5. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.
6. On the **Service Activity** form, enter any additional information about the service activity.
   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
     You can save the service activity now, or continue to add information.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Location**
     You can enter an address or room number where the service activity will occur.

- **Show Time As**
  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
- **Site**
  Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
- **Notes**
  You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.

7. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

View a list of resources

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You can view a list of resources in the Service calendar area. The Service calendar includes a scalable, linear view of the resources' schedules.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **Type** list, select the type of resource (user, resource, or facilities and equipment), and then in the **View** list, select the view of that resource that you want to see.
3. In the list of resources, you can do any of the following:

- Click a letter on the alphabetical jump bar at the bottom of the list to go to that section of the list.
- Expand the list pane by dragging the right edge to view additional columns of information.
- Reverse the sort order of the list by clicking a column heading.
- View general information about a single resource by selecting the resource in the list and then clicking the **Expand** button under the **Zoom** bar.

Create a service activity without checking for conflicts

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

If you save this service activity without finding available times in the schedule, then the service activity appears on the schedule without checking for conflicts.

One reason to force a service activity into a time slot is to squeeze another service activity into the left-over time from a previous service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **New**, and then click **Service Activity**.
3. On the **Service Activity** form, you must enter the following information:
   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
4. You can enter additional information about the service activity.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Resources**
     Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Location**
     You can enter an address or room number where the service activity will occur.
   - **Show Time As**
     If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so

that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.

- **Site**
  Locate and select the site for the service activity. Sites are defined in Microsoft Dynamics CRM and assigned to resources. Only resources from the same site will be selected. To record the specific room or address of the service activity, enter information in the **Location** box. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

5. Under **Scheduling Information**, you must enter the **Start Time** and **End Time**, but the other information is optional.

   - **Start Time** and **End Time**
     Select or type in the date and times the service activity starts and ends. The **Duration** box is updated to the length of the service activity. If you select a different duration, the **End Time** is adjusted. If you type in both the start and end times, the duration will change.
     If this is an all-day event, click **All Day Event**. An all-day event is actually the entire working day of the selected resource. If the resource works 8 a.m. to noon, then an all-day event is four hours.

   - **Duration**
     You can add additional time to the end of a time slot by changing the duration. The maximum duration of an activity is 10 days. The default duration is determined by the selected service.

   - **Notes**
     You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

6. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.

7. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- If at any time before you save this service activity, you want to search the schedule for an available time, you can click **Schedule** on the Actions toolbar to open the **Schedule Service Activity** dialog box.
- Check the schedule for schedule conflicts

Find and view the work schedule for an individual resource

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. In the **Type** list, click **Resource**.
3. In the **Look for** box, type the name of the resource, or the last name of a user, and then click **Find**.
   You can use asterisks (*) as wildcards in your search.
   The search results appear in the list pane.
4. In the Service calendar, you can do the following:
   - To view current appointments and service activities for a resource, select the name from the list. The schedule appears in the schedule pane to the right of the list.
   - To view a specific date, select a date in the **Calendar** pane.
   - To quickly change the date range, use the **Zoom** controls at the bottom of the schedule pane.
5. To view work hours for a specific resource, follow these steps:
   a. In the list of resources, open the resource you want to view.
      The User or Facilities/Equipment form opens. If you have sufficient permissions, this form can be edited.
   b. On the User or Facilities/Equipment form, click **Work Hours**. The monthly calendar displays the start and end time for each day's schedule. If a schedule has not been set, or the resource is always available, the calendar displays **All Day**.
   c. To change the month you are viewing, at the top of the calendar, click the forward and back arrows on either side of the displayed month and year.
   d. To edit the schedule, double-click a date on the calendar. Change the schedule as needed.

Check the schedule for schedule conflicts

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Show Conflicts**.
   The button label changes to **Hide Conflicts** and any service activities, appointments, or resources that have scheduling conflicts are outlined in red.

Change the status of a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

After a service activity is created, you can change the service activity status. The status of a service activity is displayed in the Service calendar and the Workplace calendar.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Service calendar, select the service activity you want to change.
3. On the Actions toolbar, click **Change Status**.
4. In the **Change Status** dialog box, in the **Show Time As** list, select the new status, and then click **OK**.
   The status of the service activity is updated and the color of the service activity time slot changes.

Note

When you close a service activity, the activity becomes read-only and cannot be edited.

Reschedule a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. Locate and select the service activity you want to reschedule.
3. On the Actions toolbar, click **Reschedule**.
4. On the **Schedule Service Activity** form, change any of the information you want.
5. Click **Find Available Times**.
   Microsoft Dynamics CRM returns a list of available time slots that meet the criteria on the form. If you do not find a suitable time slot, change the criteria, and try again.
6. In the **Available Times** list, select a time slot.
7. Click **Schedule**.
8. Click **Save** or **Save and Close**.

Note

You cannot reopen closed service activities. To reactivate canceled service activities, on the **Actions** menu, click **Reactivate**. The service activity will be reopened and the status will be updated to Requested. If the time is no longer available, you may get a message. To reschedule the service activity for an available time, click **Schedule**.

Close or cancel a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You cannot reopen closed service activities.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. Locate and open the service activity you want to close.
3. On the **Actions** menu, click **Close Service Activity**.
4. In the **Service Activity Close Confirmation** dialog box, in the **Status** list, do one of the following:
   - If the service activity is completed and can be billed, select **Completed**.
   - If the service activity will not be completed and cannot be billed, click **Canceled**.
   - If the customer never arrived and the service activity cannot be billed, select **No Show**.
5. Click **OK**.
6. On the Standard toolbar, click **Close**.
   The service activity appears in the Service calendar, color-coded with its current status and the subject of the service activity.

Note

To reactivate canceled service activities, on the **Actions** menu, click **Reactivate**. The service activity will be reopened and the status will be updated to Requested. If the time is no longer available, you may get a message. To reschedule the service activity for an available time, click **Schedule**.

Booking Service Activities in the Service Calendar

The Service calendar displays all of your organization's scheduled service activities and appointments as blocks of time in a linear view of the daily, weekly, or monthly calendar. Resources can also see their service activities in their Workplace calendar.

The main purpose of the service calendar is to monitor service activities and book services for customers. Services are defined to require specific personnel, facility, and equipment. Resources have schedules that define when they are available to perform services. When you schedule a service, you can search for an available time, and then book the service by saving the service activity. That time is reserved for the selected resources.

Conflicts in Schedules and Rescheduling Service Activities

When you save a service activity or an appointment, an alert informs you if there is a potential conflict. You can choose to select another time, or book the service activity anyway. At any time, you can identify any service activities or appointments with conflicts and reschedule them.

Schedule Service Activity

Use this form to search for an available time for a service activity. You can either search for an open time using search criteria that at a minimum includes selecting a service, or you can define a more complex set of criteria. You can also create a service activity without checking for conflicts in the scheduled service. The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

You cannot create a recurring service activity. Create individual service activities as appropriate.

Find the next available time

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available times for a service. This is the fastest way to schedule a service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
4. Click **Find Available Times**. The next available times are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.
5. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.
6. On the **Service Activity** form, enter any additional information about the service activity.
   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
     You can save the service activity now, or continue to add information.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Resources**
     Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

- **Location**
  You can enter an address or room number where the service activity will occur.
- **Show Time As**
  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
- **Site**
  Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
- **Notes**
  You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

7. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
8. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Find the next available time within a specific time period

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available time based on a specific date, or range of dates, within the next day, week, or month.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.

2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.

3. On the **Schedule Service Activity** form, you must enter the following information:

   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.

4. Under **Requested Time**, select criteria for the times you want.

   - **Start Date**
     - To search for a time on a specific date, select **Specific Date**, and then enter the date you want.
     - To search within a range of dates, select **Range of Dates**, and then enter the **On or After** and **On or Before** dates. You can also select specific days of the week.
     - To search for times today, select **Today**.
     - You can also search for times based on dates relative to today, such as **Tomorrow**, **This Week**, or **Next Week**.
   - **Start Time**
     - To search for a specific time, select **Specific Time**, and then enter the specific time.
     - To search within a specific range of time, select **Range of Times**, and then enter the earliest and latest times you want the service activity to start.
     - You can also search for times based on the time of day, such as **Morning** or **Evening**.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.

5. Click **Find Available Times**. The next available times are displayed.

6. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.

7. On the **Service Activity** form, enter any additional information about the service activity.

   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
     You can save the service activity now, or continue to add information.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

- **Resources**
  Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
- **Location**
  You can enter an address or room number where the service activity will occur.
- **Show Time As**
  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
- **Site**
  Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
- **Notes**
  You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

8. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
9. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Important

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Find an available time with specific criteria

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available time based on a set of specific criteria. For example, if the customer wants your head mechanic to work on his bicycle, you can search the head mechanic's schedule for the next available time.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
4. Click **Find Available Times**. The next available times in the selected resource's schedule are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.
5. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.

6. On the **Service Activity** form, enter any additional information about the service activity.
   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
     You can save the service activity now, or continue to add information.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Location**
     You can enter an address or room number where the service activity will occur.

- **Show Time As**
  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
- **Site**
  Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
- **Notes**
  You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.

7. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Create a service activity without checking for conflicts

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

If you save this service activity without finding available times in the schedule, then the service activity appears on the schedule without checking for conflicts.

One reason to force a service activity into a time slot is to squeeze another service activity into the left-over time from a previous service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.

2. On the Actions toolbar, click **New**, and then click **Service Activity**.

3. On the **Service Activity** form, you must enter the following information:

- **Subject**
  You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
- **Service**
  Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.

4. You can enter additional information about the service activity.

- **Customers**
  If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
- **Resources**
  Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
- **Location**
  You can enter an address or room number where the service activity will occur.
- **Show Time As**
  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
- **Site**
  Locate and select the site for the service activity. Sites are defined in Microsoft Dynamics CRM and assigned to resources. Only resources from the same site will be selected. To record the specific room or address of the service activity, enter information in the **Location** box. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

5. Under **Scheduling Information**, you must enter the **Start Time** and **End Time**, but the other information is optional.

- **Start Time** and **End Time**
  Select or type in the date and times the service activity starts and ends. The **Duration** box is updated to the length of the service activity. If you select a different duration, the **End Time** is adjusted. If you type in both the start and end times, the duration will change.
  If this is an all-day event, click **All Day Event**. An all-day event is actually the entire working day of the selected resource. If the resource works 8 a.m. to noon, then an all-day event is four hours.
- **Duration**
  You can add additional time to the end of a time slot by changing the duration. The maximum duration of an activity is 10 days. The default duration is determined by the selected service.
- **Notes**
  You can add additional information about the customer and service activity in this area. For

example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

6. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
7. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- If at any time before you save this service activity, you want to search the schedule for an available time, you can click **Schedule** on the Actions toolbar to open the **Schedule Service Activity** dialog box.
- Check the schedule for schedule conflicts

Reschedule a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. Locate and select the service activity you want to reschedule.
3. On the Actions toolbar, click **Reschedule**.
4. On the **Schedule Service Activity** form, change any of the information you want.
5. Click **Find Available Times**.
   Microsoft Dynamics CRM returns a list of available time slots that meet the criteria on the form. If you do not find a suitable time slot, change the criteria, and try again.
6. In the **Available Times** list, select a time slot.
7. Click **Schedule**.
8. Click **Save** or **Save and Close**.

Note

You cannot reopen closed service activities. To reactivate canceled service activities, on the **Actions** menu, click **Reactivate**. The service activity will be reopened and the status will be updated to Requested. If the time is no longer available, you may get a message. To reschedule the service activity for an available time, click **Schedule**.

Close or cancel a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You cannot reopen closed service activities.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. Locate and open the service activity you want to close.
3. On the **Actions** menu, click **Close Service Activity**.
4. In the **Service Activity Close Confirmation** dialog box, in the **Status** list, do one of the following:
   - If the service activity is completed and can be billed, select **Completed**.
   - If the service activity will not be completed and cannot be billed, click **Canceled**.
   - If the customer never arrived and the service activity cannot be billed, select **No Show**.
5. Click **OK**.
6. On the Standard toolbar, click **Close**.
   The service activity appears in the Service calendar, color-coded with its current status and the subject of the service activity.

Note

To reactivate canceled service activities, on the **Actions** menu, click **Reactivate**. The service activity will be reopened and the status will be updated to Requested. If the time is no longer available, you may get a message. To reschedule the service activity for an available time, click **Schedule**.

Work with Service Activities

You can search for an available time to perform a service for a customer. Notices and reminders are not sent automatically to the customer or the resource providing the service.

Find the next available time

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available times for a service. This is the fastest way to schedule a service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.

3. On the **Schedule Service Activity** form, you must enter the following information:

   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.

4. Click **Find Available Times**. The next available times are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.

5. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.

6. On the **Service Activity** form, enter any additional information about the service activity.

   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
     You can save the service activity now, or continue to add information.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Resources**
     Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Location**
     You can enter an address or room number where the service activity will occur.
   - **Show Time As**
     If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
   - **Site**
     Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
   - **Notes**
     You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

7. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
8. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Work with the Workplace Calendar

Use the Workplace calendar to view by the day, week, or month and to create and edit appointments and service activities.

View the calendar in the Workplace area

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

The Workplace calendar displays the appointments and service activities to which you are a participant.

1. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Calendar**.
2. On the calendar, you can change the view by doing any of the following:
   - To change the calendar view, under **Calendar Views**, click one of the views:
     - **Month**
       The calendar displays a monthly calendar.
     - **Week**
       The calendar displays a 7-day week.
     - **Day**
       The calendar displays an hourly list for a single day.
   - To view a summary of an appointment, on the calendar, place the cursor over the appointment.
   - To view or edit the details of an appointment, on the calendar, click the appointment link. The **Appointment** form opens.
3. To change the dates displayed on the calendar, on the calendar control, click the arrows or a specific date.

4. To view today's appointments and service activities, on the calendar control, click **Today**. The calendar displays the hourly list for today.
5. To refresh the calendar, in the top right corner of the calendar, click the **Refresh** button .

Note

The calendar displays canceled and completed appointments and service activities. To remove an appointment or service activity from the calendar, delete the record.

Print the details of an activity from a calendar

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can print the details of an appointment or service activity from the Workplace calendar or the Service calendar.

1. Locate and open the appointment or service activity you want to print.
2. On the Actions toolbar, click the **Print** button .
3. In the **Preview** dialog box, click **Print**.
4. In the **Print** dialog box, set the printing options you want, and then click **Print**.
5. On the Standard toolbar, click **Close**.

Note

To print the entire calendar as you see it in the window, click **Print** in Microsoft Internet Explorer.

Create or edit an appointment

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can modify any of the information in an open appointment. If you change the date and times of the appointment, Microsoft Dynamics CRM will recheck for schedule conflicts. You cannot create a recurring appointment. The calendar displays canceled and completed appointments and service activities. To remove an appointment or service activity from the calendar, delete the record.

1. Create an appointment in:

Calendar in Workplace

a. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Calendar**.
b. Under **Create a New**, click **Appointment**.

Service Calendar

a. In the Navigation Pane, click **Service**, and then click **Service Calendar**.

b. On the Actions toolbar, click **New**, and then click **Appointment**.

Activities area

a. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

b. On the Actions toolbar, click **New**.

c. In the **New Activity** dialog box, click **Appointment**, and then click **OK**.

4. In the **Appointment** dialog box, on the **Appointment** tab, you must enter information in the following fields:

- **Subject**
  Enter a description of the appointment. The first 12 characters appear in the Workplace calendar and Service calendar.
- **Start Time**
  Enter the date and time that the appointment begins.
- **End Time**
  Enter the date and time that the appointment ends. Microsoft Dynamics CRM automatically sets the appointment for a duration of 30 minutes starting on the next half hour.
- **Required**
  To locate and select participants that must attend this appointment, click the box next to the label. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
  Participants are not sent notification of new or updated appointments. In Microsoft Dynamics CRM for Outlook you can include recipients that are not contacts in Microsoft Dynamics CRM. The names are displayed as red text. Click the red name to resolve it to an existing contact or account, or create a new record.

Add optional information.

- To add **Optional** participants, click **Lookup** to search for records.
- In the **Location** box, enter the room or address where the appointment will occur.
- In the **Show Time As** list, select how you want the appointment to appear on your calendar. If you select **Free** or **Tentative**, other appointments and service activities can be scheduled during that time.
- In the **Duration** box, record the time you spend on the activity. If this activity is related to a case and the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer. The maximum duration of an appointment or service activity is 10 days.
- Click **All Day Event** if this event is for the entire time you are working. The appointment's duration will be the same as your working hours. For example, if your working hours are 9 a.m. to 6 p.m., then the duration of your appointment is 9 hours, but will display as "1 day".

On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.

On the **Details** tab, you can link the appointment to another Microsoft Dynamics CRM record and change the **Organizer**. If your business uses **Category** and **Sub-Category** to organize your business data, enter them on this tab.

Click **Save** or **Save and Close**.

If one or more of the participants (including you as the originator) have a service activity or appointment during this time, a warning appears. You can click **Ignore and Save** to save the appointment anyway.

The new appointment appears in the calendar and list of activities for the participants. If the owner is not a participant, the activity will not appear in his or her calendar.

Notes

- Appointments created in the Web application and synchronized with Microsoft Dynamics CRM for Outlook automatically set a 15-minute reminder and appear in the Outlook calendar. You can change the reminder in Outlook.
- To re-open a canceled appointment, on the **Actions** menu, click **Reactivate**.

Find the next available time

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available times for a service. This is the fastest way to schedule a service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
4. Click **Find Available Times**. The next available times are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.
5. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.
6. On the **Service Activity** form, enter any additional information about the service activity.

- **Subject**
  You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
  You can save the service activity now, or continue to add information.
- **Customers**
  If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
- **Resources**
  Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
- **Location**
  You can enter an address or room number where the service activity will occur.
- **Show Time As**
  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
- **Site**
  Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
- **Notes**
  You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

7. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
8. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Find the next available time within a specific time period

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available time based on a specific date, or range of dates, within the next day, week, or month.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
4. Under **Requested Time**, select criteria for the times you want.
   - **Start Date**
     - To search for a time on a specific date, select **Specific Date**, and then enter the date you want.
     - To search within a range of dates, select **Range of Dates**, and then enter the **On or After** and **On or Before** dates. You can also select specific days of the week.
     - To search for times today, select **Today**.
     - You can also search for times based on dates relative to today, such as **Tomorrow**, **This Week**, or **Next Week**.
   - **Start Time**
     - To search for a specific time, select **Specific Time**, and then enter the specific time.
     - To search within a specific range of time, select **Range of Times**, and then enter the earliest and latest times you want the service activity to start.
     - You can also search for times based on the time of day, such as **Morning** or **Evening**.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
5. Click **Find Available Times**. The next available times are displayed.
6. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.

7. On the **Service Activity** form, enter any additional information about the service activity.

   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
     You can save the service activity now, or continue to add information.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Resources**
     Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Location**
     You can enter an address or room number where the service activity will occur.
   - **Show Time As**
     If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
   - **Site**
     Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
   - **Notes**
     You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

8. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
9. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Important

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.

- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Find an available time with specific criteria

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

Use this procedure to find the next available time based on a set of specific criteria. For example, if the customer wants your head mechanic to work on his bicycle, you can search the head mechanic's schedule for the next available time.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. On the Actions toolbar, click **Schedule**.
   Note: If you click **New**, and then **Service Activity**, you will create a service activity without checking for available times.
3. On the **Schedule Service Activity** form, you must enter the following information:
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Duration**
     Do not clear the **Use Default Duration** check box and change the duration unless you want to schedule more time than the default duration of the service. The maximum duration of a service activity is 10 days.
4. Click **Find Available Times**. The next available times in the selected resource's schedule are displayed. If there is more than one page of records available to view in the list of records, use the **Page** arrows at the bottom of the list to view the additional pages.
5. Under **Available Times** click on the start or end time of the time you want to schedule, and then click **Schedule**. If you click the service or resource links, the related form opens.

   The **Schedule Service Activity** form closes and Microsoft Dynamics CRM fills in the information from the selected time into the **Service Activity** form.
6. On the **Service Activity** form, enter any additional information about the service activity.
   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
     You can save the service activity now, or continue to add information.
   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Location**
     You can enter an address or room number where the service activity will occur.

- **Show Time As**
  If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
- **Site**
  Changing the **Site** after you have selected a time for the service activity is not recommended. Resources are assigned to sites. If the selected resources are not available at the selected site, there might be conflicts. To record the specific room or address of the service activity, enter that information in the **Location** box on the **Service Activity** form.
- **Notes**
  You can add additional information about the customer and service activity in this area. For example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.

7. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- Changing any information in the Scheduling Information area after you have selected a time for the service activity is not recommended. Doing so might cause conflicts in the schedule.
- In the list of possible service activity search results, you can click the Page Back arrow to initiate a new search. Paging back does not display the previous page.

Create a service activity without checking for conflicts

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

If you save this service activity without finding available times in the schedule, then the service activity appears on the schedule without checking for conflicts.

One reason to force a service activity into a time slot is to squeeze another service activity into the left-over time from a previous service activity.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.

2. On the Actions toolbar, click **New**, and then click **Service Activity**.

3. On the **Service Activity** form, you must enter the following information:

   - **Subject**
     You must enter a subject. The first 12 characters appear on the Service calendar and the calendar in your **Workplace**.
   - **Service**
     Locate and select the service you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.

4. You can enter additional information about the service activity.

   - **Customers**
     If this service activity is for a customer, you can locate and select the account or contact. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Resources**
     Locate and select the user, or facility and equipment that you want to schedule. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.
   - **Location**
     You can enter an address or room number where the service activity will occur.
   - **Show Time As**
     If you want to change the initial status of the service activity, select a status from the list. If you select any of the statuses under **Scheduled**, that block of time on the schedule is set so that another service activity or appointment cannot conflict with it during automatic scheduling. Forced service activities and appointments might conflict.
   - **Site**
     Locate and select the site for the service activity. Sites are defined in Microsoft Dynamics CRM and assigned to resources. Only resources from the same site will be selected. To record the specific room or address of the service activity, enter information in the **Location** box. You can select a record from a filtered list in the Form Assistant pane, or you can click **Lookup** to search for other records.

5. Under **Scheduling Information**, you must enter the **Start Time** and **End Time**, but the other information is optional.

   - **Start Time** and **End Time**
     Select or type in the date and times the service activity starts and ends. The **Duration** box is updated to the length of the service activity. If you select a different duration, the **End Time** is adjusted. If you type in both the start and end times, the duration will change.
     If this is an all-day event, click **All Day Event**. An all-day event is actually the entire working day of the selected resource. If the resource works 8 a.m. to noon, then an all-day event is four hours.
   - **Duration**
     You can add additional time to the end of a time slot by changing the duration. The maximum duration of an activity is 10 days. The default duration is determined by the selected service.
   - **Notes**
     You can add additional information about the customer and service activity in this area. For

example, you could enter the symptoms of a problem, special requests by the customer, or any messages to pass on to the resources providing the service.

6. On the **Details** tab, you can select and locate a record in the **Regarding** box to link to this service activity. You can also set a **Priority** for the service activity, and record a **Category** and **Sub-Category**.
7. Click **Save** or **Save and Close**.
   The service activity appears as a color block on the Service calendar, as well as on the calendar in the Workplace and Activities areas.

Tip

You can record a customer's preferences for a specific time, day, service, facility, equipment, and customer service representative in the customer record on the **Administration** tab. As you are scheduling a service activity, the customer's preference is displayed in the **Form Assistant** pane.

Notes

- If at any time before you save this service activity, you want to search the schedule for an available time, you can click **Schedule** on the Actions toolbar to open the **Schedule Service Activity** dialog box.
- Check the schedule for schedule conflicts

Close or cancel a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

You cannot reopen closed service activities.

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. Locate and open the service activity you want to close.
3. On the **Actions** menu, click **Close Service Activity**.
4. In the **Service Activity Close Confirmation** dialog box, in the **Status** list, do one of the following:
   - If the service activity is completed and can be billed, select **Completed**.
   - If the service activity will not be completed and cannot be billed, click **Canceled**.
   - If the customer never arrived and the service activity cannot be billed, select **No Show**.
5. Click **OK**.
6. On the Standard toolbar, click **Close**.
   The service activity appears in the Service calendar, color-coded with its current status and the subject of the service activity.

Note

To reactivate canceled service activities, on the **Actions** menu, click **Reactivate**. The service activity will be reopened and the status will be updated to Requested. If the time is no longer available, you may get a message. To reschedule the service activity for an available time, click **Schedule**.

Reschedule a service activity

Can I do this task?

This task requires permissions that are found in all default service scheduling security roles. More information about specific permissions and performing this task while offline: Service Scheduling Permissions

1. In the Navigation Pane, click **Service**, and then click **Service Calendar**.
2. Locate and select the service activity you want to reschedule.
3. On the Actions toolbar, click **Reschedule**.
4. On the **Schedule Service Activity** form, change any of the information you want.
5. Click **Find Available Times**.
   Microsoft Dynamics CRM returns a list of available time slots that meet the criteria on the form. If you do not find a suitable time slot, change the criteria, and try again.
6. In the **Available Times** list, select a time slot.
7. Click **Schedule**.
8. Click **Save** or **Save and Close**.

Note

You cannot reopen closed service activities. To reactivate canceled service activities, on the **Actions** menu, click **Reactivate**. The service activity will be reopened and the status will be updated to Requested. If the time is no longer available, you may get a message. To reschedule the service activity for an available time, click **Schedule**.

Work with Appointments

Use this form to create, edit, or reschedule an appointment for an account, contact, facility/equipment, lead, or user. After you save this form, you can add attachments, check for duplicates, and convert this appointment to an opportunity or case.

Create or edit an appointment

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can modify any of the information in an open appointment. If you change the date and times of the appointment, Microsoft Dynamics CRM will recheck for schedule conflicts. You cannot create a recurring appointment. The calendar displays canceled and completed appointments and service activities. To remove an appointment or service activity from the calendar, delete the record.

1. Create an appointment in:

Calendar in Workplace

a. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Calendar**.

b. Under **Create a New**, click **Appointment**.

- **Service Calendar**

a. In the Navigation Pane, click **Service**, and then click **Service Calendar**.

b. On the Actions toolbar, click **New**, and then click **Appointment**.

- **Activities area**

a. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

b. On the Actions toolbar, click **New**.

c. In the **New Activity** dialog box, click **Appointment**, and then click **OK**.

4. In the **Appointment** dialog box, on the **Appointment** tab, you must enter information in the following fields:

- **Subject**
  Enter a description of the appointment. The first 12 characters appear in the Workplace calendar and Service calendar.
- **Start Time**
  Enter the date and time that the appointment begins.
- **End Time**
  Enter the date and time that the appointment ends. Microsoft Dynamics CRM automatically sets the appointment for a duration of 30 minutes starting on the next half hour.
- **Required**
  To locate and select participants that must attend this appointment, click the box next to the label. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
  Participants are not sent notification of new or updated appointments. In Microsoft Dynamics CRM for Outlook you can include recipients that are not contacts in Microsoft Dynamics CRM. The names are displayed as red text. Click the red name to resolve it to an existing contact or account, or create a new record.

Add optional information.

- To add **Optional** participants, click **Lookup** to search for records.
- In the **Location** box, enter the room or address where the appointment will occur.
- In the **Show Time As** list, select how you want the appointment to appear on your calendar. If you select **Free** or **Tentative**, other appointments and service activities can be scheduled during that time.
- In the **Duration** box, record the time you spend on the activity. If this activity is related to a case and the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer. The maximum duration of an appointment or service activity is 10 days.

- Click **All Day Event** if this event is for the entire time you are working. The appointment's duration will be the same as your working hours. For example, if your working hours are 9 a.m. to 6 p.m., then the duration of your appointment is 9 hours, but will display as "1 day".

On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.

On the **Details** tab, you can link the appointment to another Microsoft Dynamics CRM record and change the **Organizer**. If your business uses **Category** and **Sub-Category** to organize your business data, enter them on this tab.

Click **Save** or **Save and Close**.

If one or more of the participants (including you as the originator) have a service activity or appointment during this time, a warning appears. You can click **Ignore and Save** to save the appointment anyway.

The new appointment appears in the calendar and list of activities for the participants. If the owner is not a participant, the activity will not appear in his or her calendar.

Notes

- Appointments created in the Web application and synchronized with Microsoft Dynamics CRM for Outlook automatically set a 15-minute reminder and appear in the Outlook calendar. You can change the reminder in Outlook.
- To re-open a canceled appointment, on the **Actions** menu, click **Reactivate**.

Close an activity

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Activity types that can be closed

- Tasks
- Faxes
- Phone Calls
- Letters
- Appointments
- Service Activities
- Campaign Activities

Unless you have created an activity record by mistake, it is better to close or convert an activity than to delete it. You can view closed or converted activities at a later date for reference, or run reports to determine the success rate of your activities.

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

– OR –

To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.
3. On the **Actions** menu, click **Close** *activity type*. For example, if you are in a task record, click **Close Task**.
4. In the confirmation dialog box, select the status that you want from the **Status** list, such as **Completed** or **Canceled**, and then click **OK**.

Notes

- When you close an activity, the activity becomes read-only and cannot be edited or reopened.
- To view closed activities, do one of the following:
  - In the Activities list, select the **Closed Activities** view.
  - Use Advanced Find, and specify **Activity Status** in the search criteria.
  - From an Account, Contact, Lead, or Opportunity record, under **Details**, click **History**. In the **Filter on** and **Include** lists, select the view options that you want.
- It is not possible to close multiple activities at once.
- The only way to close an e-mail activity is to send it. If you do not use Microsoft Dynamics CRM to send or receive e-mail, click **Send**. This will close the activity, but no e-mail message will be sent.

Convert an activity to a case

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

1. Navigate to activity records. In the Navigation Pane, click **Workplace**, and then under **My Work** click **Activities**.

   – OR –

   To work with activities associated with a record, open the record and then click **Activities**.

2. Open the activity that you want.

Activity types that can be converted

- Faxes
- Phone Calls
- E-mail Messages
- Letters
- Appointments

3. On the Actions toolbar, point to **Convert Activity** and then to **Case**.
4. In the **Convert Activity to Case** dialog box, enter information in the following boxes:
    - **Customer**

      You must click the **Lookup** button to select or create a new customer.
    - By default, Microsoft Dynamics CRM automatically completes the following operations during the conversion:
        - Close the activity as completed.
        - Open the new case after the conversion.

    To change the conversion operations, clear the associated check boxes.
5. In the **Convert Activity to Case** dialog box, click **OK**.

Note

The originating activity becomes a related activity for the new case. If the activity is open, it appears in the **Activities** list for the case. If the activity is closed, it appears in the **History** list.

Providing Customer Service with Contracts and Cases

Creating Contracts

Contracts record service level agreements (SLAs) and entitlements. You can create contracts for existing customers that specify the type of service and terms that apply to each customer. This information includes the duration of the contract, how many case incidents or minutes of service purchased, what hours and days of the week coverage is available, and the service entitlements. The contracts can also include the notes for that entitlement, to record additional details such as the response time; preventive maintenance plans; which products or parts of the product are covered; and service details such as the type of service and billing for labor, parts, and other expenses.

Creating a Contract

New contracts are created based on contract templates, which pre-define some information, such as allotment types. You can create contracts only for existing accounts and contacts. A contract has the status of *draft* until it is invoiced. You can change the contract template until the contract status changes. Each new contract is assigned a unique ID that cannot be used for another contract unless it is being renewed. When you renew a contract, it is saved as a draft with an ID that corresponds to the original contract. If a contract with a status of *Invoiced* or *Active* is modified, the amended contract remains associated with the original account.

More information: Work with Contract Templates and Work with Contracts

You can record specific service level agreements, such as pricing and how the support is allocated, as contract lines. For example, you can note whether the service agreement is limited by the number of cases opened, or by the total number of minutes of customer service allowed. You cannot invoice a contract unless it has at least one contract line. Contract lines also let you track how much of a service allotment has been used.

You can add notes and attachments to contracts, and set rules to run based on the contract status, contract start date, or contract end date. For example, you could set a workflow rule to create a task to review the contract when the contract end date is reached.

Invoicing and Activating a Contract

After a contract has at least one contract line and a billable address, you can mark the contract as invoiced. When you change the status, it implies that you have accepted the contract. Microsoft Dynamics CRM does not automatically invoice the customer or create an invoice record unless your business has integrated Microsoft Dynamics CRM with a Microsoft BackOffice product. The contract status is *Invoiced* until the start date has passed, and then the status changes to *Active*. You cannot delete a contract with the *Invoiced* or *Active* status.

Viewing Contracts

By default, the Customer Service Representative (CSR) security role grants all CSRs the permissions required to retrieve contracts and view their details.

Verifying Entitlements for a Case by Viewing a Contract

When a CSR opens a case, he or she can look up a customer's contract and determine the appropriate level of support. The CSR can associate a case to a specific contract and contract line. The amount of support allotment used is recorded automatically in the contract, however, the CSR can manually change it.

Putting a Contract on Hold or Canceling a Contract

A contract is *Active* and CSRs can open cases against it until the date the contract ends unless the contract is put *on hold* or *canceled*.

If you want to suspend or deactivate a contract for an indefinite period of time, you can put it on hold. You cannot open cases or log an activity against a contract. If the contract end date passes while the contract is set on hold and then the contract is reactivated, the contract status changes to *Expired*.

After a contract has been canceled, it cannot be reopened or renewed.

Renewing a Contract

After the end date of the contract has passed, the contract is expired and cases cannot be opened against it. To open a new case against the contract, renew the contract. When you renew a contract, a draft copy of the contract is created with the same ID number as the original, expired contract. You can make modifications to the new *draft* contract, including adding or modifying contract lines. You also have the option of including contract lines that were canceled from the original contract. When the original contract expires, you can invoice and activate the renewed contract.

A renewed contract has the same ID number as the original contract, with the renewal action reflected in the contract's history. The start date is automatically set to the day after the existing contract expires, and for the same duration as the original contract. However, you can manually change the duration.

Work with Contracts

After you save a contract record, you can add contract lines, activities, attachments, and cases.

Create or edit a contract

▸ Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

You can edit an existing *draft* contract, but not invoiced or active contracts.

Note: Although it is possible, creating a contract from an account is not recommended. The contract does not associate to the account correctly and allotments are not recorded.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. Use one of the following procedures:

▸ Start a contract from a template

The contract template determines the the allotment type (minutes or cases), billing frequency, discounts, and the day and times service is available; however, with the exception of allotment type, this information can be changed in the contract.

a. On the Actions toolbar, click **New**.
b. In the **Template Explorer** dialog box, select the template you want to use, and then click **OK**.
c. In the contract form, in the **Contract Name** box, type a unique name for the contract. For example, *Adventureworks - technical support for wireless network*.

▸ Start a new contract by copying an existing contract

Microsoft Dynamics CRM creates a copy of the contract with a unique ID number. Any changes you make to this copy do not affect the original contract.

a. From the list, open the contract you want to copy.

b. In the **Contract** form, on the **Actions** menu, click **Copy Contract**.

c. In the **Copy Contract** dialog box, clear **Include canceled contract lines** unless you want to keep them, and then click **OK**.

In the original contract, contract lines were canceled when they expired or the allotment is exceeded. If you want to reuse the contract lines, do not clear the check box.

4. On the **General** tab, you must enter information in the following boxes:

- **Customer**
  Select the customer who this contract covers. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
- **Contract Start Date**
- **Contract End Date**

When the contract is saved, the **Contract ID** is automatically assigned by Microsoft Dynamics CRM and the Duration in Days is calculated by Microsoft Dynamics CRM based on the contract start and end dates. A contract address is required to change the status of the contract to *invoiced*.

In the Billing Information area, the fields are completed automatically by Microsoft Dynamics CRM when the corresponding Heading area fields are entered; however, you can change or enter the information as required. **Bill To Address** is required to change the status of the contract to *invoiced*.

In the Pricing area, the amounts are read-only, and are calculated based on the pricing and discounts entered in the contract lines. To change the pricing, update the contract lines. To recalculate the amounts, on the Actions toolbar, click **Recalculate**.

On the **Details** tab, enter additional information about the contract.

In the Contract Type area, you can change the discount and service level. Discounts for contract lines are given the same discount type that you select here. Service levels are defined by your business's guidelines.

In the History area, the following fields are automatically completed when the contract was created.

- **Originating Contract**
  The contract that the current contract was copied from. This field cannot be changed.
- **Owner**
  This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
- **Contract Template**
  You can change the contract template, if the contract status is *draft*.

On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.

Click **Save** or **Save and Close**.

After the contract is invoiced, the contract becomes active when the start date is reached.

▸ Resolve potential duplicate records.

0. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
1. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
    - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
2. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Notes

- You must define at least one contract line for the contract before you can change the status of the contract to *invoiced*. You can define several contract lines for each contract; for example, one for parts and another for maintenance. You cannot delete a contract line once it is active; instead, you can cancel it.
- The default days and hours of service are defined in the contract template. To change the days and hours of service, on the Actions toolbar, click **Calendar**.
- You cannot edit an *active* contract, but you can cancel it or put it on hold. A canceled contract can be renewed and then edited. When a contract is *on hold*, no cases can be opened against the contract. For example, you might choose to put a contract on hold if there is an invoicing dispute, and then release the contract when the dispute is resolved. On the **Actions** menu, click **Hold Contract** or **Release Hold**. To view a list of contracts on hold, in the **View** list, click **Contracts On Hold**.

Add or edit a contract line

▸ Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

Adding contract lines to a contract is the second step in creating and invoicing a contract. Contract lines also include specific dates, the product covered, and how many cases or total minutes of allotted support are provided, for example, 15 cases or 100 minutes. You can define several contract lines for each contract, for example, one for parts and another for maintenance. The contract line also tracks the amount of the allotment that has been used.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. In the contract list, open the service contract to which you want to add a contract line.

3. Under **Details**, click **Contract Lines**.
4. On the Actions toolbar, click **New Contract Line**.
5. On the **General** tab, you must enter information in the following fields:
    - **Title**
      This information should be a descriptive of the contents of the contract line. For example, if this line is for a specific product, include the name in the title.
    - **Start Date**
    - **End Date**
    - The **Start Date** and **End Date** for the line are completed automatically by Microsoft Dynamics CRM based on the contract dates; however, you can change the dates as needed.
    - To locate and select a product, click the box. You can click the **Lookup** button to search for other records.
    - To enter a unit, quanity, or location, click the correct box and either locate and select the information or enter it. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
    - In the **Allotment Details** area, in the **Total Cases/Minutes** box, type the total case or minute allotment.
      The contract template determines the type of allotment (cases or minutes). As cases are opened against this contract, the allotments used are displayed in the **Allotments Used** box.
    - In the **Pricing** area, enter pricing information. Do not type a currency symbol or decimal.
    - **Total Price**
      You must enter the total price for this contract line.
    - If you enter a discount, the amount must either be less than the total price, or less than 100%.
6. On the **Administration** tab, you can change the customer and enter the serial number of a product. Microsoft Dynamics CRM automatically fills in the **Customer** box based on the contract's customer. However, you can change it if needed.
7. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
8. Click **Save** or **Save and Close**.

Notes

- If cases have been opened against this contract, Microsoft Dynamics CRM tracks how much of the allotted support has been used in the **Allotment Details** area. You can change the **Total Cases/Minutes** to increase or decrease the allotment.
- You can cancel a contract line only when it is set to Active. When the contract is set to draft, you must delete contract lines. After a contract line is closed, cases cannot be opened against the contract. The advantage of canceling a contract line instead of deleting it is that if you renew this contract or create a new contract based on this contract, you can reuse the contract lines. On the **Actions** menu, click **Cancel Contract Line**.
  In the **Cancel Contract** dialog box, in the **Cancellation Date** box, enter the date you want to cancel the contract line, and then click **OK**.

Invoice and activate a contract

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

Microsoft Dynamics CRM does not automatically invoice the customer or create an actual invoice unless your business has integrated Microsoft Dynamics CRM with a Microsoft BackOffice product. The invoice record displays information about the invoice, not the invoice itself.

When a contract is marked as invoiced, the status changes to *Invoiced* until the start date. Then, the status changes to *Active*.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. In the contract list, open the service contract you want to invoice.
3. On the **Actions** menu, click **Invoice Contract**.
   The status is listed in the **Status** column in the contract list. The invoice record is displayed in the **Invoice** list.

Note

After a contract is marked as invoiced, you cannot delete the contract or change any contract information, such as the dates, contract names, or the contract ID. You can add new contract lines and cancel existing contract lines.

Cancel or delete a contract

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

You can cancel an active contract or invoiced contract, or delete a draft contract. You cannot delete an invoiced contract, even if it has been canceled.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. From the list, open the service contract you want to cancel or delete.
3. To cancel a contract, on the **Actions** menu, click **Cancel Contract**. In the **Cancel Contract** dialog box, type the cancellation date, and then click **OK**.
   You can view canceled contracts in the **Canceled Contracts** view.
4. To delete a contract, on the **Actions** menu, click **Delete Contract**, and then click **OK**.

Note

If you want to temporarily cancel a contract, you can put the contract "on hold." When a contract is *on hold*, no cases can be opened against the contract. For example, you might choose to put a contract on hold if there is an invoicing dispute, and then release the contract when the dispute is resolved. On the **Actions** menu, click **Hold Contract** or **Release Hold**. To view a list of contracts on hold, in the **View** list, click **Contracts On Hold**.

Renew a contract

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

You can renew any invoiced contracts, including those that have expired. You can work in unexpired contracts as drafts, but they cannot be renewed until they expire. Renewed contracts have the same contract ID as the expired contract.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. In the **View** list, click **Expired Contracts**.
3. In the list of contracts, open the expired or invoiced contract you want to renew.
4. In the contract form, on the **Actions** menu, click **Renew Contract**.
5. If you do not want to include canceled contract lines, in the **Renew Contract** dialog box, clear the **Include canceled contract lines** check box, and then click **OK**.
6. A copy of the contract is made and the status is set to either *Draft* for copies of expired contracts or *Invoiced* for copies of invoiced contracts. The start date is set for one day after the existing contract expires.
7. Make any changes that are necessary. If the originating contract has already expired, you will need to invoice this contract.
8. Click **Save** or **Save and Close**.

Work with Contract Lines

After you save a contract line, you can add cases and workflow jobs.

Add or edit a contract line

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: Configuration Permissions

Adding contract lines to a contract is the second step in creating and invoicing a contract. Contract lines also include specific dates, the product covered, and how many cases or total minutes of allotted support are provided, for example, 15 cases or 100 minutes. You can define several contract lines for each contract, for example, one for parts and another for maintenance. The contract line also tracks the amount of the allotment that has been used.

1. In the Navigation Pane, click **Service**, and then click **Contracts**.
2. In the contract list, open the service contract to which you want to add a contract line.
3. Under **Details**, click **Contract Lines**.
4. On the Actions toolbar, click **New Contract Line**.
5. On the **General** tab, you must enter information in the following fields:

- **Title**
  This information should be a descriptive of the contents of the contract line. For example, if this line is for a specific product, include the name in the title.
- **Start Date**
- **End Date**
- The **Start Date** and **End Date** for the line are completed automatically by Microsoft Dynamics CRM based on the contract dates; however, you can change the dates as needed.
- To locate and select a product, click the box. You can click the **Lookup** button to search for other records.
- To enter a unit, quanity, or location, click the correct box and either locate and select the information or enter it. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
- In the **Allotment Details** area, in the **Total Cases/Minutes** box, type the total case or minute allotment.
  The contract template determines the type of allotment (cases or minutes). As cases are opened against this contract, the allotments used are displayed in the **Allotments Used** box.
- In the **Pricing** area, enter pricing information. Do not type a currency symbol or decimal.
- **Total Price**
  You must enter the total price for this contract line.
- If you enter a discount, the amount must either be less than the total price, or less than 100%.

6. On the **Administration** tab, you can change the customer and enter the serial number of a product. Microsoft Dynamics CRM automatically fills in the **Customer** box based on the contract's customer. However, you can change it if needed.
7. On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
8. Click **Save** or **Save and Close**.

Notes

- If cases have been opened against this contract, Microsoft Dynamics CRM tracks how much of the allotted support has been used in the **Allotment Details** area. You can change the **Total Cases/Minutes** to increase or decrease the allotment.
- You can cancel a contract line only when it is set to Active. When the contract is set to draft, you must delete contract lines. After a contract line is closed, cases cannot be opened against the contract. The advantage of canceling a contract line instead of deleting it is that if you renew this contract or create a new contract based on this contract, you can reuse the contract lines. On the **Actions** menu, click **Cancel Contract Line**.
  In the **Cancel Contract** dialog box, in the **Cancellation Date** box, enter the date you want to cancel the contract line, and then click **OK**.

Supporting Customer Service with Microsoft Dynamics CRM

Microsoft Dynamics CRM includes a set of features that work together to help you track and record your customer service activities.

Recording Entitlements Through Contracts

A contract and its specific contract lines record the details of the customer service to be provided to an account, including the number of calls allowed or the total number of minutes that can be spent with them.

To increase consistency and efficiency when you create contracts, you can create a contract template that can be shared. You can associate cases with a specific contract or contract line in a contract. Allotment types in contracts keep track of either the number of cases opened against a contract or the total number of minutes spent working with cases for a contract. More information: Creating Contracts

Tracking Customer Service Through Cases

When a customer contacts your organization by telephone, letter, or e-mail, a Customer Service Representative (CSR) opens a case and enters information about the customer and the customer's issue. The CSR can review the contract lines in the customer's contract to determine the appropriate entitlement. If the person who opens the case is not the one to resolve it, the case can be either assigned to a queue or to another CSR. That CSR researches the problem, logs the activity and the time spent on the case, and then resolves and closes it. More information: Creating Contract Templates

By logging activities and time spent on a case, a manager can track performance and productivity. Open and resolved cases can be searched, and resolved cases can be reopened so that additional activities and time can be logged against them, if necessary. More information: Using Queues to Manage Your Activities and Cases

Queuing and Routing Services

You can create queues to sort incoming cases according to subject-matter expertise, product teams, or other business designations to ensure that a CSR with the right experience gets each case. You can also assign cases directly to specific CSRs. More information: Creating Queues for Incoming Cases

Sharing Information in the Knowledge Base

CSRs can share information, including common issues and the approved fixes, product sheets, and updates, in the form of searchable articles stored in the knowledge base. CSRs can search for articles by title, keyword, full-text search, or article number. After a CSR finds the right article, the CSR can e-mail the article directly to the customer and store it with the case for review later. More information: Publishing Articles in the Knowledge Base

Scheduling Services

With scheduling, you can provide a service to your customers and ensure that the right combination of personnel, facilities, and equipment are available to perform the service. You can also track a customer's preferences for time of day, service, and personnel. More information: Defining Rules and Resources for Services

Managing Performance and Productivity through Reports

Reports are an efficient way to stay informed of customer service performance in your organization. The information tracked during case handling can be turned into reports that measure statistics, such as call length, number of cases handled, number of cases resolved, and types of resolutions. With this information, you can create more precise schedules, forecast resource needs, and manage performance improvements. More information: Default Service Reports

Work with Cases

After you save a case, you can add an activity, an attachment, or a system job.

As the first step of resolving a case, you can view the total amount of time spent on that case. You can view this information without actually resolving the case.

Create or edit a case

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. On the Actions toolbar, click **New**.
3. On the **General** tab, you must enter information in the following boxes:
    - **Title**
      This information should include a general description of the problem. For example, if a customer calls about a problem with a late delivery, include the expected delivery date.
    - **Customer**
      To locate and select a customer, click the box beside the label. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
    - **Subject**
      Selecting a subject for the case associates that case with similar cases. This is useful for searching for cases with similar problems and for finding related articles. To locate and select a subject, click the box beside the label and use the **Form Assistant** pane. If the subject you want does not appear in the list, contact your system administrator to add it. More information: Requesting User Interface Changes
    - In the **Overview** area, enter all of the information you have about this case. This information can be used in reports. In the **Assignment Information** area, enter information about how you want the case managed.
    - **Owner**
      This box is filled automatically with the name of the user who is creating the record. You can click the **Lookup** button to search for other records.
    - In the **Contract and Product Information** area, enter information about the entitlements. Linking the contract and contract line to the case allows you to track allotment usage and verify that the customer is receiving the appropriate level of service.
4. On the **Notes and Article** tab, enter additional information about the case.
    - **Notes**
      Click to enter a longer description of the issue, or any additional information that you want to record about this case.
    - **Knowledge Base Article** area
      Locate and select an article about the issue. The **Form Assistant** pane displays a list of suggested articles based on the selected subject.
    - **Show article**
      Select this check box to view the article in the case.
5. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Notes

- The first time you save the case, Microsoft Dynamics CRM assigns it a unique case number.
- When you complete an activity, be sure to record the amount of time you spend on the activity in the **Duration** box. If this case is linked to a contract line, the durations of all of the activities for this case are tallied and updated automatically in the related *active* contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer.

Assign a case to a user or queue

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

After a case is created, it can be assigned to another user or to a queue. After accepting a case, the assigned user can continue working with the customer.

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. In the list of cases, select the case you want to assign.

Or, select multiple records

- Select several records by pressing the CTRL key while you click each record.

- Select a sequence of records by clicking the first record that you want, and then press the SHIFT key while you select the last record that you want.
- Select all records on the page by selecting the **Select/clear all records on this page** check box at the top of the list.

By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

4. On the **Tools** menu, click **Options**.
5. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
6. Click **OK**.

This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

On the Actions toolbar, click the **Assign** button .

In the **Assign to Queue or User** dialog box, to assign the case to another user or queue, select **Assign to another user or queue**.

Then to select a record, click the **Lookup** button .

Click **OK**.

Note

After a case is assigned to a queue, it is displayed in the **Queues** area. If it was assigned to a user, it will appear in his or her **Assigned** area. An assigned case belongs to the user who created it until it is accepted by another user.

Resolve a case

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

When a problem has been solved or addressed to the customer's satisfaction, you can resolve the case and record the resolution and the amount of time to be billed to the customer.

Before a case can be resolved, all of its activities must be closed. If the case is linked to a contract line, it must be active and have sufficient allotments to resolve the case. You can only resolve cases one at a time.

1. Navigate to the list of cases. In the Navigation Pane, click **Service**, and then click **Cases**.

   – OR –

   In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Queues**. Then, under **My Work**, click **In Progress**.

2. In the list of cases, open the one you want to resolve.

3. On the **Actions** menu, click **Resolve Case**.
   If there are any open activities for this case, you have to close them first.
4. In the **Resolve Case** dialog box, in the **Resolution Type** list, select how the case was resolved.
5. In the **Resolution** box, type a short explanation of the resolution.
6. The actual time spent on all activities, as recorded in the **Duration** box in each activity, for this case is filled out automatically in the **Total Time** box.
   This total is for information only and cannot be edited.
7. In the **Billable Time** list, select the amount of time spent on the case to be billed to the customer.
   If this case is linked to a contract, the billable time will be subtracted from the allotted minutes for that contract.
8. Type a longer description of the resolution and any other notes in the **Description** box.
9. Click **OK**. The form closes.
10. On the Standard toolbar, click **Close**.

Notes

- A Case Resolution activity is created in the **History** area.
- Resolved cases appear in the **Resolved Cases** view. A case can be reactivated at any time. It will be reassigned automatically to the customer service representative (CSR) who resolved it.

Reactivate a case

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

If a case was resolved but additional actions are required, you can reactivate it and modify it as needed. The case is reassigned to the customer service representative (CSR) that owned the case when it was closed. The benefit of reactivating the case is that you do not have to re-enter any data. In addition, you maintain the original history of the case.

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. In the **View** list, click **My Resolved Cases** or **Resolved Cases**.
3. In the list of cases, open the one you want to reactivate.
4. On the **Actions** menu, click **Reactivate**.
5. In the **Reactivate the Selected Case** dialog box, click **OK**.
6. Modify the information on the form or add any activities you want.
   More information: Work with Activities
7. Click **Save** or **Save and Close**.

Notes

- Reactivated cases appear in the **Active Cases** view and the **My Active Cases** view of the CSR who owns the case.
- A new activity is not created, but the Case Resolution activity is canceled.

Send an article from a case

Can I do this task?

This task requires permissions that are found in all default service security roles. More information about specific permissions and performing this task while offline: Service Permissions

1. In the Navigation Pane, click **Service**, and then click **Cases**.
2. In the **View** list, select the filtered view you want.
3. In the list of cases, open the case you want to view.
4. On the **Notes and Article** tab, click the **Article** box and search for the article. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
5. Select the **Show article** check box.
   The article appears, along with a task bar that includes **Show Comments** and **E-mail KB Article** commands.
6. Click **E-mail KB Article**.
   The E-mail form opens with all the information about this case already filled in.
7. Make any changes to the e-mail you want; however, any changes you make to the article will not be saved in the original article.
8. To send the e-mail, click **Send**.
   If you are offline, you will need to go online to send the e-mail.
9. Click **Save** or **Save and Close**.
   This saves or saves and closes the e-mail message. The e-mail message appears as an activity for the case.
10. Click **Save** or **Save and Close**.
    This saves or saves and closes the case form.

Chapter 5: Microsoft Dynamics CRM for Outlook

This chapter explains the use of the Outlook Client in Microsoft Dynamics CRM.

Records and Activities in Outlook

Doing CRM Work in Outlook

Microsoft Dynamics CRM for Microsoft Office Outlook is an add-in for Microsoft Dynamics CRM that is installed on your desktop or laptop computer. Microsoft Dynamics CRM for Outlook brings Microsoft Dynamics CRM into your everyday Microsoft Office Outlook experience because the Microsoft Dynamics CRM areas appear as sub-folders in the Outlook mail folders.

You can perform most of the same sales, marketing, and customer services in Microsoft Dynamics CRM for Microsoft Office Outlook that you can in Microsoft Dynamics CRM, including working with accounts, contacts, and campaigns. The Microsoft Dynamics CRM address book gives you access to all the e-mail addresses for your Microsoft Dynamics CRM customers.

For day-to-day work, you can use Microsoft Dynamics CRM for Outlook, but not all Microsoft Dynamics CRM features are available if you are working offline.

More information: Working Offline

Similarities in Working in Microsoft Dynamics CRM for Outlook and Microsoft Office Outlook

Microsoft Dynamics CRM for Outlook automatically starts when Outlook is opened. An icon in the Windows notification area displays the current status: Online, Offline, or Disabled. To view a list of records, click the folder for that record type. The preview pane displays the list. If you have an older version of Outlook, you may have to expand folders to find the Microsoft Dynamics CRM folders.

Microsoft Dynamics CRM appointments and service activities appear in the Outlook calendar and, in addition, task activities (tasks, faxes, phone calls, and letters), can have reminders.

Differences between Working in Microsoft Dynamics CRM for Outlook and Outlook

Because Microsoft Dynamics CRM uses standard Microsoft Internet Explorer controls, some Outlook features are not available in Microsoft Dynamics CRM for Outlook.

Not available in Microsoft Dynamics CRM for Outlook	**Work around**
E-mail signatures	Use a global e-mail template.
Full-text editing features	Standard editing controls, such as press ENTER for double-spaced lines and SHIFT+ENTER for single-spaced lines.
Attaching files during creation	Save an e-mail activity before attaching files.
Move records by dragging and dropping.	None - this causes data loss. More information: Using Microsoft Dynamics CRM for Outlook - Troubleshooting

Reminders	After synchronization with Outlook, 15-minute reminders are created for appointments and service activities created in the Microsoft Dynamics CRM folders or in the Web application.
Microsoft Dynamics CRM Service calendar	You can request that your System Administrator or System Customizer add it.

Working Offline

If you have installed Microsoft Dynamics CRM for Outlook with Offline Access, you can select a subset of the Microsoft Dynamics CRM for Outlook data to take with you offline as local data and on the road. Whenever you go online, your local data is synchronized with the server so that changes you have made to your local records when you are working offline are synchronized to the Microsoft Dynamics CRM database.

More information: Synchronizing Information

There are a few things that you cannot do, and information that you cannot access when you are offline. For example, managing settings and users.

More information: Working Offline

Synchronizing Outlook, Microsoft Dynamics CRM for Outlook, and Microsoft Dynamics CRM

When you are online, Outlook and Microsoft Dynamics CRM for Outlook are constantly synchronizing updates. While you are online, Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM synchronize every 15 minutes. Your system administrator can set a different time interval for synchronization, and you can set an even more frequent time interval. When you go offline, Microsoft Dynamics CRM for Outlook synchronizes automatically with Microsoft Dynamics CRM, and then synchronizes again when you come back online.

While you are offline with Microsoft Dynamics CRM, contacts, tasks, appointments, phone calls, letters, faxes, and service anointments, that you create, delete or update in Microsoft Dynamics CRM for Outlook while offline will be updated to Outlook, but will not update Microsoft Dynamics CRM until you go back online.

More information: Synchronizing Information

Creating Mail-Merge Documents with Microsoft Office Word

You can use Microsoft Dynamics CRM for Outlook with Microsoft Office Word to create customer-ready documents for your Microsoft Dynamics CRM customers that display Microsoft Dynamics CRM data. Using mail merge, you can:

- Create new templates or use an existing template to generate form letters for yourself or, with the appropriate permissions, for the whole organization.
- Send form letters or form e-mail messages to contacts, accounts, or marketing mailing lists.
- Resend old letters to new recipients.
- Create faxes.
- Create quotes.

More information: Send Direct E-mail to Customers

Sharing a Computer with Multiple Users

If your business has several people sharing the same computer, they each can install Microsoft Dynamics CRM for Outlook with their individual credentials. For example, several shift workers at a central office all working on the same computer can use Microsoft Dynamics CRM for Outlook and sign in as themselves. When you use a standard version of

Microsoft Dynamics CRM for Outlook, you cannot go offline. Regular synchronization with Outlook and Microsoft Dynamics CRM still occurs.

Install Microsoft Dynamics CRM for Outlook

Microsoft Dynamics CRM for Outlook is an add-in installed on your computer that allows you to work with Microsoft Dynamics CRM data in Outlook. After installing the add-in, there are options that must be set.

More information: Doing CRM Work in Outlook

Install Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

Before installing Microsoft Dynamics CRM for Microsoft Office Outlook, read the Installation Chapter included on the Download page.

The Microsoft Dynamics CRM for Microsoft Office Outlook is included on the Microsoft Dynamics CRM Client CD, and then installed and run on the Microsoft Dynamics CRM server.

1. Insert the Microsoft Dynamics CRM Client CD, and double-click Setup.exe
2. On the Microsoft Dynamics CRM Setup screen, click Microsoft Dynamics CRM for Microsoft Office Outlook, click and follow the instructions in the Setup wizard.

Important

After installing Microsoft Dynamics CRM for Outlook, there are options that need to be set to enable you to send and receive e-mail from Outlook for Microsoft Dynamics CRM and to determine what data is synchronized.

More information: Work with Your User Record and Work Hours, Set Personal Options

Set address book options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select how the address book is managed in Outlook and Microsoft Dynamics CRM for Outlook and how often you want to synchronize between applications. This tab is not available in the Web application.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Options**.
3. In the **Set Personal Options** dialog box, on the **Address Book** tab, you can select how contacts and other record types are synchronized, and whether or not e-mail recipients are linked to Microsoft Dynamics CRM records.
4. By default, the Outlook Address Book is synchronized with the Microsoft Dynamics CRM address book every 24 hours. If your organization permits it, you can change this interval. To change this interval, change the number between 1 and 60. Your administrator sets the minimum time allowed between synchronization.

5. To save your changes and close the dialog box, click **OK**.

Note

If you want to synchronize your address book manually, synchronize Microsoft Dynamics CRM manually. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Synchronize Outlook with CRM**.

Set the e-mail access method for a user or a queue

Can I do this task?

This task requires a manager, vice president, CEO-Business Manager, System Administrator, or System Customizer security role or equivalent permissions. More information about specific permissions and performing this task while offline: E-mail Permissions

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.

   – OR –

   In the Navigation Pane, click **Settings**, click **Business Management**, and then click **Queues**.

2. Open the user or queue you want to modify.
3. Under **E-mail Access Configuration**, select how e-mail will be accessed for incoming and outgoing mail.
   - **None**
     E-mail will not be sent or received.
   - **Forward Mailbox**
     E-mail will be forwarded from another e-mail address.
   - **Microsoft Dynamics CRM for Outlook**
     E-mail is sent and received with Microsoft Dynamics CRM for Outlook.
   - **E-mail Router**
     E-mail is sent and received with the Microsoft Dynamics CRM E-mail Router. If this item is selected, the **Allow credentials** check box is displayed. To require that credentials be entered, select the check box.
4. Click **Save** or **Save and Close**.

Notes

- If you have selected an e-mail option, verify that there is a valid e-mail address in the **E-mail** box.
- If you select **Microsoft Dynamics CRM for Outlook** as your e-mail option, you must also allow Microsoft Dynamics CRM to send mail through Microsoft Dynamics CRM for Outlook.

Specify how your e-mail is tracked

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can use an existing e-mail address to send and receive e-mail with Microsoft Dynamics CRM. After your system administrator sets up your e-mail address, you can update the password.

1. Under **Workplace**, click the **Personalize Workplace** link.
2. In the **Set Personal Options** dialog box, on the **E-mail** tab, select the option that you want from the **Track** list:
   - **All e-mail messages**
     All of the messages from the account listed in your user profile will be saved as Microsoft Dynamics CRM activities.
   - **E-mail messages in response to CRM e-mail**
     Only e-mail messages received as replies from messages sent from Microsoft Dynamics CRM will be saved as Microsoft Dynamics CRM activities.
   - **E-mail messages from CRM Leads, Contacts, and Accounts**
     Only e-mail messages received from leads and customers will be saved as Microsoft Dynamics CRM activities.
3. To save your changes and close the dialog box, click **OK**.

Set synchronization options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select which record types you want to synchronize between Outlook and Microsoft Dynamics CRM for Outlook and how often you want to synchronize between applications. This tab is not available in the Web application.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Options**.
3. In the **Set Personal Options** dialog box, on the **Synchronization** tab, you can select which record types are synchronized:
   - **Appointments I'm attending**
     Select this option if you want to synchronize appointments and service activities in which you are a participant and have accepted the appointment.
   - **My tasks**
     Select this option if you want to synchronize tasks that you own in Microsoft Dynamics CRM.

- **Contacts**
  Select this option if you want to synchronize contacts that you own in Microsoft Dynamics CRM.
  If you delete a contact you own in Microsoft Dynamics CRM or in Microsoft Dynamics CRM for Outlook, it will not be deleted in the other application.
- **My phone calls**
  Select this option if you want to synchronize phone calls that you own in Microsoft Dynamics CRM.
- **My letters**
  Select this option if you want to synchronize letters that you own in Microsoft Dynamics CRM.
- **My faxes**
  Select this option if you want to synchronize faxes that you own in Microsoft Dynamics CRM.

4. If you want to include company names from Outlook contacts, select **Update Company fields with parent account names**.
   Important: This setting only affects newly tracked contacts. Future changes are not synchronized.
5. If you have more than one computer running Microsoft Dynamics CRM for Outlook, select this computer to be the synchronizing client.
6. If your organization permits it, you can define how often Microsoft Dynamics CRM items in your Microsoft Dynamics CRM for Outlook folders are updated:
   - **Synchronize the CRM items in my Outlook folders every**
     Select this option and select the number of minutes. You can increase the amount of time between synchronization of items in your Microsoft Dynamics CRM for Outlook folders. Your administrator sets the minimum time allowed between synchronization.
7. Select how duplicates are handled during synchronization:
   - **Create the duplicates**
     This option allows records to be created even if key fields contain the same data.
     More information: Avoiding Duplicate Records
   - **Do not create duplicates**
     This option blocks records from being created if key fields contain the same data.
8. To save your changes and close the dialog box, click **OK**.

Update Microsoft Dynamics CRM for Outlook

Occasionally, your administrator will make updates to Microsoft Dynamics CRM that require you to install the updates on your computer. When updates are available, you will be prompted to install them. Some updates are optional, and you can postpone installing them until later. Other updates are mandatory and must be installed, or Microsoft Dynamics CRM for Outlook will be disabled on your computer.

You can also choose to check for updates and then choose which ones to install.

Update Microsoft Dynamics CRM for Outlook on your computer

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

This procedure is not available in the Microsoft Dynamics CRM Web application. It applies only to Microsoft Dynamics CRM for Outlook.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Check for Updates**.
3. If there are updates, in the **Available Updates for Microsoft Dynamics CRM Office Client** dialog box, click **Update Now**.

Important

If you prefer to install updates later, click **Cancel**. Skipping mandatory updates may cause Microsoft Dynamics CRM for Outlook to be disabled. If this occurs, install the updates to restore functionality.

Connect to Another Organization in Microsoft Dynamics CRM for Outlook

When you are in Outlook, if you belong to more than one organization, you can change the Microsoft Dynamics CRM organization while online. This feature is not available when you are offline.

Change the organization you are logged in to

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

This feature is available only if you are a member of more than one organization. If you need to be added to additional organizations, contact your system administrator.

1. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Change Organization**.
2. In the Microsoft Dynamics CRM Office Configuration Wizard, click **Change your configuration**, and then click **Next**.
3. Complete the wizard.

Sending and Receiving E-mail in Microsoft Dynamics CRM for Outlook

When you are working in Microsoft Dynamics CRM for Microsoft Office Outlook, you can use all the familiar Outlook buttons and toolbars with the Microsoft Dynamics CRM toolbar and menu to manage e-mail messages and most other activities. At any time, you can track an Outlook e-mail message in Microsoft Dynamics CRM. Tracked messages still appear in the Outlook mail folders. There is a personal option setting to change the icon with a Microsoft Dynamics CRM **Tracked in CRM** icon . A copy of the e-mail message is saved as an activity and is available in the Microsoft Dynamics CRM Activities area. You can link the activity to a record in Microsoft Dynamics CRM. You can also set your personal options so that all incoming e-mail is tracked in Microsoft Dynamics CRM.

More information: Set Personal Options

Important

Because Microsoft Dynamics CRM shares data between users, many of the default privacy assumptions of a full e-mail system do not apply. This means that an e-mail activity that is associated with a Microsoft Dynamics CRM record as a regarding record (for example, a case, account, or contact) has the same visibility as any other activity associated with that record, and any user who has access to the record and its associated activities also has access to the e-mail message.

Managing Incoming E-mail

When you use Microsoft Dynamics CRM for Outlook, all the e-mail you receive arrives in your Outlook Inbox, and only e-mail that originated as a Microsoft Dynamics CRM e-mail activity (that is, a response to e-mail you send from Microsoft Dynamics CRM), or that is marked as tracked in Microsoft Dynamics CRM, arrives in the Microsoft Dynamics CRM Activities and My Work: Queues area. If you prefer, you can:

- Track all incoming e-mail as Microsoft Dynamics CRM e-mail activities.
- Track only e-mail that originated in Microsoft Dynamics CRM (that is, e-mail sent in response to a Microsoft Dynamics CRM e-mail activity) into Microsoft Dynamics CRM e-mail activities.
- Track only e-mail related to your accounts, contacts, or leads.

If you choose not to track all incoming e-mail, you can manually track selected messages in Outlook as e-mail activities in Microsoft Dynamics CRM.

However, if you track all your e-mail messages as Microsoft Dynamics CRM e-mail activities, they can be accessed by anyone who has permission to view or work with your activities. Also, when you track an e-mail message with attachments to a Microsoft Dynamics CRM activity, the attachments are included in the activity. If you do not want these attachments to be available to other users, delete them from the e-mail activity.

More information: Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records

Sending and Replying to E-Mail Messages

You can link Microsoft Dynamics CRM e-mail activities to active contacts, accounts, leads, facilities, equipment, queues, or users in Microsoft Dynamics CRM. You can select active Microsoft Dynamics CRM records with e-mail addresses from the Microsoft Dynamics CRM address book, which is installed automatically when you install Microsoft Dynamics CRM for Outlook. E-mail activities can also be tracked in Microsoft Dynamics CRM without being related to another record.

Microsoft Dynamics CRM

When you send, reply, or forward an e-mail that is tracked as a e-mail activity, a closed activity is created for each account and contact referenced and displayed in the History area. Closed e-mail activities cannot be updated except to link them to a related Microsoft Dynamics CRM record. If a related record has not already been selected, you have the option of select one.

More information: Managing E-mail Activities

Working with Microsoft Dynamics CRM for Outlook with Offline Access Offline and Synchronizing with Microsoft Dynamics CRM

If you install Microsoft Dynamics CRM for Outlook with Offline Access, you have the option of working offline from the Microsoft Dynamics CRM server. You can create Microsoft Dynamics CRM e-mail messages that are sent when you go back online. If you send Outlook e-mail messages, those are sent immediately.

More information: Synchronizing Information

When you are working with Microsoft Dynamics CRM for Outlook with Offline Access offline, if you create and send an e-mail message and the message fails to be delivered or is blocked, for example, because the recipient does not want to receive e-mail or the mail server is down, the e-mail is saved to your **Drafts** folder in Outlook, but a closed Microsoft

Dynamics CRM activity is created. In Microsoft Dynamics CRM, you can use the Pending E-mail view to unsent messages. When you are working offline,Microsoft Dynamics CRM e-mail messages that you send are saved to your Outlook offline queue, and when you go online, Microsoft Dynamics CRM automatically tries to send them and create the activities. If an e-mail message cannot be sent, it is saved in Microsoft Dynamics CRM as a draft activity, but does not appear in your **Drafts** folder in Outlook.

More information: Working Offline

Using the Microsoft Dynamics CRM Address Book

You can use the Microsoft Dynamics CRM address book to select records from Microsoft Dynamics CRM in Outlook. The address book includes accounts, contacts, facilities/equipment, leads, queues, and users. You can access the Microsoft Dynamics CRM address book from the same menu as your other Outlook address books and use it in the same way.

The address book is also used to reconcile e-mail recipients in incoming messages to Microsoft Dynamics CRM contacts and link them automatically. How the contacts are matched is set in your personal options.

More information: Set Personal Options

Working with Records and Activities in Microsoft Dynamics CRM for Outlook

With Microsoft Dynamics CRM for Microsoft Office Outlook, you can work in all areas of Microsoft Dynamics CRM for which you have privileges.

Creating New Records and Activities

There are a number of places to create new records and activities using Microsoft Dynamics CRM for Outlook :

- **Outlook toolbar buttons and menus**
  You can create new contacts, tasks, appointments, and e-mail messages that use the familiar Outlook forms. You can track a record or activity in Microsoft Dynamics CRM. You can designate Outlook tasks as Microsoft Dynamics CRM phone calls, faxes, or letters. Records that you track are linked and updates to the records in Outlook are propagated in Microsoft Dynamics CRM and vice versa. You can set personal options to always use Microsoft Dynamics CRM or Outlook forms.

  After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

  More information: Set Personal Options

- **Microsoft Dynamics CRM toolbar**
  You can create new activities and records; search for records; and link Outlook e-mails messages, tasks, appointments, and contacts to Microsoft Dynamics CRM records. You can also open Microsoft Dynamics CRM Help from this toolbar. If you are using Microsoft Dynamics CRM for Outlook with Offline Access, you can go online and offline.

- **CRM menu**
  You can create new activities and records, open the **Microsoft Dynamics CRM** activity areas, and search for records with Advanced Find. You can also open Advanced Find and Microsoft Dynamics CRM Help from this menu.

  If you are working in Microsoft Dynamics CRM for Outlook with Offline Access, you can take data offline. From this menu, you can define what data is taken offline, initiate synchronization, and go online or go offline.

- **Microsoft Dynamics CRM folders**
  You can use the **Microsoft Dynamics CRM** folders access Microsoft Dynamics CRM records and Microsoft Dynamics CRM that use the Microsoft Dynamics CRM activity forms. If you create records

when you are working offline, they are synchronized to the Microsoft Dynamics CRM server when you go online. This method gives you other conveniences, such as access to e-mail templates.

Do not move Microsoft Dynamics CRM records or activities or Outlook-tracked records or activities from the designated folders. This can break the link to Microsoft Dynamics CRM and interrupt future tracking.

More information: Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records

Working Offline

Some areas cannot be accessed, and some records cannot be deleted, modified, shared, or assigned if you are offline.

The following list shows the features that are unavailable when you are offline

Not available offline

- Assigning records (except activities and cases)
- Converting quotes to sales orders
- Converting sales orders to invoices
- Managing system administration
- Updating system configuration
- Managing service activities
- Managing services
- Using the Service calendar and Workplace calendar
- Editing articles
- Editing or managing sales literature
- Changing organizations
- Sharing records
- Detecting duplicate records
- Managing system jobs
- Running some diagnostic tests
- Running workflow rules
- Create quick campaign and related activities from a Mail Merge

Limited availability

- Creating or viewing reports (based on local data groups and offline data)
- Running some custom business process automating (plug-ins)

Can be viewed, but cannot be edited offline

- Articles
- Sales literature

More information: Working Offline

Synchronizing Reminders and Calendars

Some activities inherit reminders from Outlook. Whether or not an activity has a reminder depends on where it was created:

- **Activities created in Microsoft Dynamics CRM for Outlook**
  Reminders for tasks, e-mail messages, and appointments created in the Microsoft Dynamics CRM for Outlook forms have the reminders provided by Outlook. Service activities created in Microsoft Dynamics CRM for Outlook are automatically set with 15-minute reminders, which cannot be changed or turned off. Service activities and appointments are synchronized with the Microsoft Dynamics CRM Service calendar and Workplace calendar. Tasks do not appear in the calendars. You cannot set reminders for faxes, phone calls, e-mails, letters, or campaign response activities created in Microsoft Dynamics CRM for Outlook.
- **Activities created in the Web Application**
  Appointments and service activities created in the Web application and synchronized with Microsoft Dynamics CRM for Outlook have 15-minute reminders set automatically based on the due date. These reminders cannot be changed or updated, even if the due date is updated. Appointments and service activities appear in both Outlook and Microsoft Dynamics CRM calendars. Faxes, phone calls, and letters that are created by tracking Outlook tasks can have reminders. These activities created with Microsoft Dynamics CRM forms, do not have reminders.

Only Microsoft Dynamics CRM appointments and service activities that are tracked in Outlook as appointments appear in both Outlook and Microsoft Dynamics CRM calendars.

Deleting Records and Activities

When you delete a linked contact, task, or appointment in Outlook or in Microsoft Dynamics CRM, one of two things can happen: the linked item can be deleted too, or the linked item remains, but the link is broken and future changes are not synchronized.

- **For contacts you own:**
  - If you delete a contact from Outlook, it is never deleted from Microsoft Dynamics CRM, but the link is broken and the record is updated.
  - If a contact is deleted from Microsoft Dynamics CRM and the contact is owned by you, it is not deleted from Outlook, but the link is broken and the record is not updated.
  - If a contact is deleted from Outlook by someone else and the contact is *not* owned by you in Microsoft Dynamics CRM, the contact is deleted from Microsoft Dynamics CRM.
- **For contacts you do not own:**
  - If a contact is deleted from Outlook by someone else and is owned by you, the contact is not deleted from Microsoft Dynamics CRM, but the link is broken and the record is not updated or recreated in Outlook.
- **For other records and activities:**
  - If a tracked record is deleted from Outlook, or an appointment declined in Outlook, and then the record or activity is updated in Microsoft Dynamics CRM, the record or activity may be recreated.
  - When you delete an e-mail message, a contact, a completed task, or a past appointment or service activity from Outlook, it is not deleted from Microsoft Dynamics CRM, but the link is broken. However, if you delete a pending (incomplete) task or future appointment from Outlook, it is also deleted from Microsoft Dynamics CRM.

- If a tracked activity is deleted from Outlook or an appointment is declined in Outlook, and then the Microsoft Dynamics CRM record is updated in Microsoft Dynamics CRM, the record or activity may be recreated during synchronization.

- **Pending appointments and tasks:**
  - If the appointment is deleted from Outlook by the owner or organizer, it is deleted from Microsoft Dynamics CRM. If it is deleted by a participant, it is not deleted from Outlook.
  - If you delete a pending task from either Outlook or Microsoft Dynamics CRM the linked task is deleted.

- **Past appointments and complete tasks:**
  - Past appointments and completed tasks are not deleted.

More information: Synchronizing Information

Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records

By using Microsoft Dynamics CRM for Outlook, you can save individual Outlook contacts, appointments, e-mail messages, and tasks as Microsoft Dynamics CRM records and activities and then link them to a related Microsoft Dynamics CRM record, such as a contact, account, or lead. Activities appear in the related record's list of activities.

You can also set options to determine how incoming e-mail is handled.

Save and link Outlook contacts in Microsoft Dynamics CRM

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can save Outlook contacts as new Microsoft Dynamics CRM contacts. You can link the newly saved record to another Microsoft Dynamics CRM record, such as an account or contact.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In the Outlook contacts folder, select up to 20 contacts.
3. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.
   In the Outlook Contacts folder, the icons beside the records change to the **Tracked in CRM** icon . The contacts appear in the Contacts area in Microsoft Dynamics CRM.
4. To add additional information to the **Contact** form, open the Outlook item, and then on the Microsoft Dynamics CRM toolbar, click **View in CRM**. The Microsoft Dynamics CRM contact record form opens.
5. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.

Tip

Click **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** is automatically activated.

Notes

- Duplicate detection identifies duplicate records when a record is tracked. Duplicate detection may occur when you synchronize or go back online.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

In Microsoft Office Outlook 2007, you can remove the link and delete the corresponding record in Microsoft Dynamics CRM. Click **Track in CRM**, and then in the confirmation message, click **Yes**.

The Company field in an Outlook contact is not automatically added to the parent account of the new Microsoft Dynamics CRM contact. More information: Set Personal Options

Save and link Outlook tasks and appointments in Microsoft Dynamics CRM

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can save an Outlook unassigned task, nonrecurring appointment, and meeting request as a new Microsoft Dynamics CRM record. You can link a newly-saved Outlook record to a Microsoft Dynamics CRM record, such as an account or contact. You can also create a new Microsoft Dynamics CRM record that links to the saved Outlook record.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In the Outlook calendar, select one or more appointments, meeting requests, or tasks that you want to add to Microsoft Dynamics CRM. You can select up to 20 records of the same record type at a time.

3. **Save Outlook tasks as Microsoft Dynamics CRM tasks**

   - On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.
     In the Outlook tasks folder, the icons beside the records change to the **Tracked in CRM** icon . Tasks appear as activities in the Activities area of Microsoft Dynamics CRM.

4. **Save Outlook tasks as Microsoft Dynamics CRM phone calls, faxes, or letters**

   - In the Outlook tasks folder, select up to 20 tasks.
   - On the Microsoft Dynamics CRM toolbar, point to **Track in CRM**, and then click the type of Microsoft Dynamics CRM activity you want to create.
     In the Outlook tasks folder, the icons beside the records change to the **Tracked in CRM** icon . New tasks appear as the selected activities in the Activities area in Microsoft Dynamics CRM.

5. You can add information to the new Microsoft Dynamics CRM Activity form, open the Outlook item, and then on the Microsoft Dynamics CRM toolbar, click **View in CRM**. The record opens.
   You cannot edit an activity after it has been closed in Microsoft Dynamics CRM, except for sent e-mail messages, which you can update with information about which record the e-mail message relates to.

6. Do one of the following to locate and select a parent record to link to this record:

   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.

Tip

Click **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** is automatically activated.

Notes

- In Microsoft Office Outlook 2007, you can remove the link and delete the corresponding record in Microsoft Dynamics CRM. Click **Track in CRM**, and then in the confirmation message, click **Yes**.
- Duplicate detection identifies duplicate records when a record is tracked. Duplicate detection may occur when you synchronize or go back online.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft

Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

If you are not selected as one of the required resources in an appointment or service activity, the activity will not appear in your Outlook calendar after synchronization.

A task stored in the Outlook default message store, or locations other than the default Exchange location, cannot be linked.

Save and link Outlook e-mail messages as Microsoft Dynamics CRM e-mail activities

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can save Outlook e-mail messages as new Microsoft Dynamics CRM e-mail activities. You can also set the **Regarding** field for any newly tracked e-mail activity.

Your administrator can block messages from being saved if they contain attachments of specific file types, such as.exe. Any messages that are stored in locations other than the default Exchange location, cannot be linked. After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In an Outlook folder, select one or more the e-mail messages you want to add to Microsoft Dynamics CRM. You can select up to 20 records at a time.
3. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.

   In the Outlook folder, the icons beside the records change to the **Tracked in CRM** icon . E-mail messages appear as activities in the Activities area of Microsoft Dynamics CRM. A sent e-mail message is linked to a closed activity. Use the **Closed Activities** view to see messages.
4. To add additional information to the Activity form, open the Outlook item, and then on the Microsoft Dynamics CRM toolbar, click **View in CRM**. The Microsoft Dynamics CRM record form opens. You cannot edit an e-mail message after it has been sent, except to include which record the e-mail message relates to.
5. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.

   A closed Microsoft Dynamics CRM e-mail activity is created when you send an e-mail message.

Tip

Click **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** is automatically activated.

Notes

- In your personal options, you can set whether replies to tracked messages are also tracked. More information: Set Personal Options
- You can also set the same regarding record for multiple records by selecting the records and then clicking **Set Regarding** or **Set Parent**, depending on the record type.
- In Microsoft Office Outlook 2007, you can remove the link and delete the corresponding record in Microsoft Dynamics CRM. Click **Track in CRM**, and then in the confirmation message, click **Yes**.

Automatically track and save incoming e-mail as Microsoft Dynamics CRM e-mail activities

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

When you track e-mail messages, activities are created in Microsoft Dynamics CRM that are linked to the original messages in Microsoft Office Outlook.

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Options**.
3. In the **Set Personal Options** dialog box, on the **E-mail** tab, select one of the following options:
   - **All e-mail messages**
     Track all incoming e-mail.
   - **E-mail messages in response to CRM e-mail**
     Track only replies to existing Microsoft Dynamics CRM e-mail messages.
   - **E-mail messages from CRM Leads, Contacts, and Accounts**
     Only e-mail messages received from leads and customers will be saved as Microsoft Dynamics CRM activities.
4. Click **OK**.

Note

After you open a message that has been converted and is being tracked in Microsoft Dynamics CRM, on the Microsoft Dynamics CRM toolbar, click **View in CRM** to open the record in Microsoft Dynamics CRM to view or edit it.

Remove tracking in Microsoft Dynamics CRM from a record

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Removing tracking from a record does not delete the record in Microsoft Dynamics CRM or from Microsoft Office Outlook. The link between the two records is broken and any changes to the regarding record will not be synchronized in future synchronizations.

This feature is available only in Microsoft Outlook 2007.

- On the Microsoft Dynamics CRM toolbar, click **Track in CRM**. In the confirmation dialog box, click **OK**
  In the Outlook folder, the icon beside the record changes back to the Outlook icon.

Tip

To change the regarding record, delete the record in Microsoft Dynamics CRM, and then in Outlook the item will still be tracked, but the regarding can be reset.

Create an Activity in Outlook

Create or edit a task or appointment in Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

Outlook only supports tasks, but when you create a task you can choose what type of Microsoft Dynamics CRM activity the task should be saved as in Microsoft Dynamics CRM. Your Outlook task can be saved as a Outlook task, phone call, letter, or fax.

You can create tasks and appointments in Outlook using either the Microsoft Dynamics CRM forms or the Outlook forms. If you have selected to synchronize your appointments and tasks to your default Outlook folders, when you create a new appointment or task, the Outlook forms open. You can view your options in your personal settings. The option to synchronize tasks and appointments and to use Outlook forms is turned on by default.

Tip

To view your synchronization options for Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Options**, and then click the **Synchronization** tab.

Everyone who was invited to the appointment (required and optional) can view the appointment in their calendars and in My Activities views.

Recurring appointments or tasks are not fully synchronized in the Web application. Only the initial appointment is synchronized. Create individual appointments and tasks as appropriate.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)

2. Do one of the following:

Create an appointment in an Outlook form

1. On the Microsoft Office Outlook Standard toolbar, click **New**.
2. On the **New** menu, click **Appointment**.
   For more information, see Outlook Help.
3. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.
   After you save the record, the **View in CRM** button becomes available.
4. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.
5. Click **Save** or **Save and Close**.
   The activity appears in your Outlook folders. The icon changes to the **Tracked in CRM** icon .
   If reminders were set up for appointments created in Microsoft Dynamics CRM for Outlook, they will be observed. A new Microsoft Dynamics CRM appointment activity is created and appears in the Microsoft Dynamics CRM Activities and Queues areas.

Tip

To open the Microsoft Dynamics CRM activity to add or edit information, click **View in CRM**.

6.

Create a task in an Outlook form

1. On the Microsoft Office Outlook Standard toolbar, click **New**.
2. On the **New** menu, click **Task**.
   For more information, see Outlook Help.
3. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**, and then click the type of Microsoft Dynamics CRM activity you want to create. You can create a task, letter, fax, or phone call activity that will be linked to the Outlook task.
   After you save the record, the **View in CRM** button becomes available.
4. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.
5. Click **Save** or **Save and Close**.
   The activity appears in your Outlook folders. The icon changes to the **Tracked in CRM** icon .
   If reminders were set up for appointments and tasks created in Microsoft Dynamics CRM for Outlook, they will be observed. A new Microsoft Dynamics CRM task or appointment activity is created and appears in the Microsoft Dynamics CRM Activities and Queues areas. When your local data synchronizes, the new activities will be copied to the Microsoft Dynamics CRM server.

Tip

To open the Microsoft Dynamics CRM activity to add or edit additional information, click **View in CRM**.

6.

Create a task or an appointment in a Microsoft Dynamics CRM form

1. In the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, expand **Workplace**.
2. Under **Workplace**, expand **My Work**, and then expand **Activities**.
3. On the Actions toolbar, click **New**.
4. In the **New Activity** dialog box, click **Task** or **Appointment**, and then click **OK**.
5. Enter the information that you want. You must enter any required information. In addition, at a minimum, entering information in the following boxes is useful when you or others in your organization refer to the activity later.
   - **Subject**
     You can quickly sort on the subject when you view activities.
   - **Owner**
     Microsoft Dynamics CRM automatically fills this box with your name. You can locate and select another owner. The activity appears in their Activity area.
   - **Duration**
     If this activity is related to a case, make sure that you record the time you spend on the activity in this box. If the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer.
   - **Due**
     Enter the date and time that the activity is expected to take place or be completed. You can quickly sort on the **Due** field when you view activities.
6. Click **Save** or **Save and Close**.

   After records are synchronized, appointment reminders are automatically set up in Outlook for 15 minutes prior to the appointment. Tasks created in the Web application or created for an appointment today do not generate reminders.

Notes

- When the duration of an activity is more than 60 minutes (an hour), the time you enter is converted into hours. When the activity is saved, the value is rounded up and might change from the entry that was originally displayed when it was converted from minutes into hours. Note that rounding is only observed on the hundredth of an hour. The exact value for the duration, however, is stored in the database in minutes, and this value is used to calculate the total billing time when resolving cases.
- When Outlook tasks and appointments with attachments that have been saved in Microsoft Dynamics CRM are synchronized between the Microsoft Dynamics CRM server and Microsoft Dynamics CRM for

Outlook, the attachments do not synchronize, but continue to exist with the original item. To retain the attachment with the activity, save the file to the local drive of your computer, and then manually add the attachment to the Microsoft Dynamics CRM activity.

Create or edit other activities in Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

These activities are not displayed in the Outlook calendar or task list.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. Under **Workplace**, expand **My Work**, and then expand **Activities**.
3. On the Actions toolbar, click **New**.
4. In the **New Activity** dialog box, select the activity you want, such as **Fax** or **Letter**, and then click **OK**.
5. Enter the information that you want. You must enter any required information. In addition, at a minimum, entering information in the following boxes is useful when you or others in your organization refer to the activity later.
   - **Subject**
     You can quickly sort on the subject when you view activities.
   - **Owner**
     Microsoft Dynamics CRM automatically fills this box with your name. You can locate and select another owner. The activity appears in their Activity area.
   - **Duration**
     If this activity is related to a case, make sure that you record the time you spend on the activity in this box. If the case is linked to a contract line, the durations of all the activities for this case are tallied and updated automatically in the related active contract. The total, which includes the totals from any other cases relating to that contract, can be adjusted manually before billing the customer.
   - **Due**
     Enter the date and time that the activity is expected to take place or be completed. You can quickly sort on the **Due** field when you view activities.
6. Click **Save** or **Save and Close**.
   Microsoft Dynamics CRM for Outlook does not set reminders for these types of activities.

Tip

Depending on the record type, you can click the **Lookup** button for the field that contains the linked record to search for and link to related records. For example, you can search for and enter the parent account in the **Parent Account** box. Microsoft Dynamics CRM will automatically update the fields in the record form with the information from the record you select.

Note

When the duration of an activity is more than 60 minutes (an hour), the time you enter is converted into hours. When the activity is saved, the value is rounded up and might change from the entry that was originally displayed when it was converted from minutes into hours. Note that rounding is only observed on the hundredth of an hour. The exact value for the duration, however, is stored in the database in minutes, and this value is used to calculate the total billing time when resolving cases.

Create and send an e-mail activity in the Web application

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create and send e-mail activities from Microsoft Dynamics CRM from the Activities area. E-mail messages sent from Microsoft Dynamics CRM do not appear in the Microsoft Dynamics CRM mail folders in Outlook.

1. Start Microsoft Dynamics CRM 4.0.
2. In the Navigation Pane, click **Workplace**, and then click **Activities**.
3. On the Actions toolbar, click **New**.
4. In the **New Activity** dialog box, click **E-mail**, and then click **OK**.
5. On the **E-mail** tab, you must enter the following information.
    - **From**
      Locate and select the sender's name.
    - **To**
      Locate and select one or more recipients. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
    - **Subject**
      Type a subject for your e-mail message.
    - **Duration**
      This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.
    - **Due**
      If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.
    - Enter any additional information you want. Use the Formatting toolbar
      You cannot enter HTML tags or insert images into the body text of the message.

Tip

- You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
- You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

6. You can also attach an article, template, or file to an e-mail activity.

To attach an article

a. To look up and select an article, on the Formatting toolbar, click **Insert KB Article**.

b. Use the **Search** tab to specify conditions or criteria to locate the article.

c. In the results list, select the article, and then click **OK**.
The article appears the body of in your e-mail message.

d. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.

b. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

c. Click **OK**.
The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

d. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

b. On the **Attachments** tab, click **New E-mail Attachment**.

c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

d. Click **Attach**.

To send the message immediately, click **Send**.
The message is sent and the new closed activity appears in the History area with an assigned message number appended to the **Subject** column and the date sent in the **Actual End** column.

– OR –

To send the message at a later time, click **Save and Close**. The new draft activity appears in the Activities area. You can delete draft messages.

To send the message, in the list of activities, open the e-mail activity, and click **Send**.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- You can view the sent date of an e-mail message on the **Activities** list. The **Actual End Date** is the date the message was sent and closed.
- You can forward or reply to an e-mail activity, but you cannot resend it.
  To reply to only the original sender, on the Actions toolbar, click **Reply**.
  To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.
  To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.
- There is no spelling checker built into Microsoft Dynamics CRM. There may be third-party solutions available. For more information, visit Microsoft Dynamics CRM Solution Finder.

Create an e-mail message in Outlook

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

You can create e-mail messages in Microsoft Office Outlook by using either the Microsoft Dynamics CRM forms or the Outlook forms. By default, the e-mail messages that have been marked for tracking are synchronized in Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM, and when you reply to or forward an e-mail message from this message, the Outlook forms open. The option that allows you to chose which form to use does not affect this.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. Do one of the following:

▸ Create an e-mail message in an Outlook form

1. On the Microsoft Office Outlook Standard toolbar, click **New**.
2. In the **New** menu, click **Mail Message**.
3. In the Outlook form, you can use either your Outlook contacts or your Microsoft Dynamics CRM contacts. For more information, see Microsoft Office Outlook Help.
4. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.
   After you send the message, the **View in CRM** button becomes available.
5. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.
6. On the **Outlook** toolbar, click **Send**.
   The e-mail message appears in your Microsoft Dynamics CRM folders. The icon changes to the **Track in CRM** button . The sent e-mail activity is saved as a Microsoft Dynamics CRM e-mail activity and appears in the Microsoft Dynamics CRM Activities area.
   An e-mail activity is not created until the message is sent.

To view the contact record, on the Microsoft Dynamics CRM toolbar click, **View in CRM**.

▸ Create an e-mail message in a form

This procedure does not create an Outlook e-mail message. These e-mail messages only appear in the Microsoft Dynamics CRM for Outlook folders and do not appear the Outlook **Sent Items** folder.

You can edit a draft e-mail message by following steps 1 through 2 to navigate to the Activities area in Microsoft Dynamics CRM for Outlook. Then, open the record you want to edit.

1. In the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, expand **Workplace**.
2. Under **Workplace**, expand **My Work**, and then expand **Activities**.
3. In the Activities area, on the **Actions** menu, click **New**.
4. In the **New Activity** dialog box, click **E-mail**, and then click **OK**.
5. On the **E-mail** tab, you must enter the following information.
   - **From**
     Locate and select the sender's name.
   - **To**
     Locate and select one or more recipients. You can select a record from a filtered list in the Form Assistant pane, or you can click the **Lookup** button to search for other records.
   - **Subject**
     Type a subject for your e-mail message.
   - **Duration**
     This field is not required, but if you are tracking the amount of time spent on cases, and this message is related to a case, enter the amount of time spent on this message.
   - **Due**
     If you are not sending your e-mail message immediately, enter a date to complete and send the message. The message is not sent automatically.
   - Enter any additional information you want. Use the Formatting toolbar
     You cannot enter HTML tags or insert images into the body text of the message.

   Tip

   - You can copy and paste content from Microsoft Office Word. This lets you take advantage of features such as spelling check and some text formatting. If your text is double-spaced, you can press SHIFT+ENTER to single-space lines of text.
   - You can include an image if the file is hosted on a public Web site. Use the copy and paste feature of Microsoft Internet Explorer to include a link to the image in the message. The image is displayed as long as the receipient has access to the Web site.

6. You can also attach an article, template, or file to an e-mail activity.

   To attach an article

   a. To look up and select an article, on the Formatting toolbar, click **Insert KB Article**.

b. Use the **Search** tab to specify conditions or criteria to locate the article.

c. In the results list, select the article, and then click **OK**.
The article appears the body of in your e-mail message.

d. Type any additional text, or edit the article.

To attach an e-mail template

a. To look up and select an e-mail template, click **Insert Template**.

b. On the **Insert Template** dialog box, select the template you want to use. You can either use a global template, or a template specific to the record type you selected as the recipient. For example, account or customer.

c. Click **OK**.
The template appears in the body of your e-mail message and the subject line is updated with the subject line of the template.

d. Type any additional text or edit the text provided. Editing the text or subject line in the message does not change the template.

To attach a file

a. Save the activity.

b. On the **Attachments** tab, click **New E-mail Attachment**.

c. In the **Add Attachment** dialog box, in the **File Name** box, type the name of the file, or click **Browse** to locate the file that you want to attach.

d. Click **Attach**.

To send the message immediately, click **Send**.
The message is sent and the new closed activity appears in the History area with an assigned message number appended to the **Subject** column and the date sent in the **Actual End** column.

– OR –

To send the message at a later time, click **Save and Close**. The new draft activity appears in the Activities area. You can delete draft messages.

To send the message, in the list of activities, open the e-mail activity, and click **Send**.

Important: If you are working offline, e-mail messages sent from the e-mail form will not be sent until you go back online. The status will still be **Closed**. You can view a list of unsent e-mail rom the Activities list, with the **My Pending E-mails** view.

Important

After you save your e-mail message as a Microsoft Dynamics CRM e-mail activity, the saved message can be accessed by anyone who has access to your activities in Microsoft Dynamics CRM.

Notes

- After a message is sent, the status is changed to **Closed** and displayed in the **History** folder. You cannot change the status or edit the message, except to link a record in the **Regarding** box, if one has not been selected.
- You can forward or reply to an e-mail activity, but you cannot resend it.
  To reply to only the original sender, on the Actions toolbar, click **Reply**.
  To reply to the original sender and to send copies to everyone who originally received the message, click **Reply All**.
  To forward the e-mail activity to new recipients, click **Forward**, and then select new recipients.

Create a Record in Outlook

Create or edit a contact in Outlook

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

By default, new contacts created in Microsoft Dynamics CRM for Outlook are updated in Microsoft Dynamics CRM immediately, and then Outlook is updated every 15 minutes. The option to synchronize contacts is on by default. When you create a new contact, the Outlook forms open. Whether an Outlook or Microsoft Dynamics CRM form opens is an option you can set. You can change your options in your personal options settings.

More information: Set Personal Options, Synchronizing Information

You can always create a contact using the Microsoft Dynamics CRM forms from the Contacts area.

▸ Tip

To view your synchronization options for Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Options**, and then click the **Synchronization** tab.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. Do one of the following:

▸ Create a contact in an Outlook form

1. On the Microsoft Office Outlook Standard toolbar, click **New**.
2. On the **New** menu, click **Contact**.
   You might need to expand the menu. For more information, see Outlook Help.
3. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.
   After you save the record, the **View in CRM** button becomes available.
4. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.
5. Click **Save** or **Save and Close**.
   The contact appears in your Microsoft Dynamics CRM Contact folder in Outlook. The icon changes

to the **Track in CRM** button . The contact is saved as a Microsoft Dynamics CRM contact and appears in the Microsoft Dynamics CRM Contacts area.
When the contact was entered, the full name of the contact was used. When the record is saved to Microsoft Dynamics CRM, the name is separated into the first name and last name.

To open the Microsoft Dynamics CRM contact to add or edit information, such as activities and addresses, click **View in CRM**. The new contact is copied to the Microsoft Dynamics CRM server immediately. Whether or not the Outlook Company field is copied to the Parent field is an option set by your organization. For more information, contact your system administrator.

Create a contact in a Microsoft Dynamics CRM form

If you have selected to not synchronize contacts, these contacts only appear in the Microsoft Dynamics CRM folders in Outlook.

You can edit a contact by following steps 1 and 2 to navigate to the **My Work** area in Microsoft Dynamics CRM for Outlook. Then, open the record you want to edit.

1. In the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, expand **Workplace**.
2. Under **My Work**, click **Contacts**.
3. On the **Actions** menu, click **New**.
4. On the **General** tab, you must enter the following information.
   - **Last Name**
     The last name of the contact is the minimum amount of information required.
   - **First Name**
     Enter the contact's full first name. Nicknames can be entered on the **Notes** tab.
5. You can enter more information on these tabs:
   - On the **Details** tab, you can enter information about the contact's role in their company and personal information about them.
   - On the **Administration** tab, you can change the owner of this contact. You can also enter billing information; the preferred method of contact (such as by e-mail or phone); and whether or not they want to receive marketing material.
   - On the **Notes** tab, click **Click here to enter a new note**, and add the information that applies to your record.
6. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click

Save Record.

– OR –

If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

7.

Tip

Depending on the record type, you can click the **Lookup** button for the field that contains the linked record to search for and link to related records. For example, you can search for and enter the parent account in the **Parent Account** box. Microsoft Dynamics CRM will automatically update the fields in the record form with the information from the record you select.

Notes

- If you delete a contact you own in Microsoft Dynamics CRM or in Outlook, the record is not deleted in the other application. If a contact that you do not own is deleted in Microsoft Dynamics CRM, then it is deleted in Outlook.
- Duplicates are not detected if you are offline. Duplicate detection may also occur when you synchronize or go back online.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated

records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Save and link Outlook contacts in Microsoft Dynamics CRM

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can save Outlook contacts as new Microsoft Dynamics CRM contacts. You can link the newly saved record to another Microsoft Dynamics CRM record, such as an account or contact.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In the Outlook contacts folder, select up to 20 contacts.
3. On the Microsoft Dynamics CRM toolbar, click **Track in CRM**.
   In the Outlook Contacts folder, the icons beside the records change to the **Tracked in CRM** icon . The contacts appear in the Contacts area in Microsoft Dynamics CRM.
4. To add additional information to the **Contact** form, open the Outlook item, and then on the Microsoft Dynamics CRM toolbar, click **View in CRM**. The Microsoft Dynamics CRM contact record form opens.
5. Do one of the following to locate and select a parent record to link to this record:
   - In Microsoft Office Outlook 2003, click **Regarding**.
   - In Microsoft Office Outlook 2007, click **Set Parent** or **Set Regarding**.

Tip

Click **Regarding**, **Set Regarding**, or **Set Parent** first, and **Track in CRM** is automatically activated.

Notes

- Duplicate detection identifies duplicate records when a record is tracked. Duplicate detection may occur when you synchronize or go back online.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

In Microsoft Office Outlook 2007, you can remove the link and delete the corresponding record in Microsoft Dynamics CRM. Click **Track in CRM**, and then in the confirmation message, click **Yes**.

The Company field in an Outlook contact is not automatically added to the parent account of the new Microsoft Dynamics CRM contact. More information: Set Personal Options

Create or edit other records in Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can create the same records in Microsoft Dynamics CRM for Outlook that you can in Microsoft Dynamics CRM by using the same familiar forms.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. In the Outlook Navigation Pane, under **Microsoft Dynamics CRM**, expand the **Marketing**, **Sales**, or **Service** folder, and then expand the folder for the record type you want to create. Not all of these folders may be available to you.
3. In the selected area, on the **Actions** menu, click **New** or open the record that you want to edit.
4. Complete the form as needed.
5. Click **Save** or **Save and Close**.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Note

Duplicates are not detected if you are offline. Duplicate detection may also occur when you synchronize or go back online.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Working Offline

If you install Microsoft Dynamics CRM for Outlook with Offline Access, you have the option of working offline with the Microsoft Dynamics CRM records that you own when you are not connected to the Microsoft Dynamics CRM server.

How to tell if you are offline

You can tell that you are offline if:

- The Windows notification area displays the **Microsoft Dynamics CRM for Outlook Not Signed In** icon .
- The Microsoft Dynamics CRM toolbar displays the **Go Online** button.
- The Microsoft Dynamics CRM menu bar displays the **Go Online** option.

Before you go offline, you can select a subset of Microsoft Dynamics CRM data to be available on your local computer. Any changes you make to this data when you work offline are saved to this local copy of your data. In addition, while you are working online, your local data is being updated periodically to help speed up going offline.

For example, instead of taking the whole database with you, you can choose to copy only your active accounts, for example accounts for the State of Washington. These local data groups can be reset every time that you go offline and give you the flexibility to download only the data you need. This speeds up synchronization with the Microsoft Dynamics CRM server when you go offline and also when you go back online. However, if you chose to remove large amounts of data from your local copy, this can cause a longer synchronization.

When you work offline, you can enter new information and edit existing records and activities. If you view edited records later, before you go online and synchronize your data, the information that you see reflects the changes that you've made.

More information: Work with Data to Take Offline

The following list shows the features that are unavailable when you are offline

Not available offline

- Assigning records (except activities and cases)
- Converting quotes to sales orders
- Converting sales orders to invoices
- Managing system administration
- Updating system configuration
- Managing service activities
- Managing services
- Using the Service calendar and Workplace calendar
- Editing articles
- Editing or managing sales literature
- Changing organizations
- Sharing records
- Detecting duplicate records
- Managing system jobs
- Running some diagnostic tests
- Running workflow rules
- Create quick campaign and related activities from a Mail Merge

Limited availability

- Creating or viewing reports (based on local data groups and offline data)
- Running some custom business process automating (plug-ins)

Can be viewed, but cannot be edited offline

- Articles
- Sales literature

Microsoft Dynamics CRM applies all your additions and changes to the Microsoft Dynamics CRM server in the same order that you entered or updated it. If you made a change to a record while you are offline, and another user changes the same record during that time, when you go back online, your change will overwrite this change.

The first time you go offline, it can take a significant amount of time to synchronize your local data with the Microsoft Dynamics CRM server. It is best to plan to do your first synchronization when you do not need to use Microsoft Dynamics CRM. While Microsoft Dynamics CRM for Outlook is synchronizing, Microsoft Dynamics CRM is not available.

Workflows

When you are working offline, workflow notifications are not generated until you go back online.

Also, if the changes you've made to offline accounts are set to trigger an automated workflow process or system job, the process is automatically triggered after you go back online. For example, if you have a rule that routes new leads to a welcoming team, a qualified lead that is created offline is routed to the welcoming team after you go back online.

Duplicate Detection

There is no duplicate detection while you are working offline. Duplicate detection is triggered automatically when you go back online or synchronize. You can set a personal option to determine whether or not duplicates are created when they are identified.

More information: Avoiding Duplicate Records

Offline Security Permissions

You have the same security permissions and rights offline as when you are online. For example, if you do not have permissions to create accounts online, you will not be able to do this offline. If a contact was shared with read-only rights, you will not be able to update or delete that contact offline even though you are working with a local copy.

Work with Data to Take Offline

Define filters for data to take offline

▸ Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You use local data groups to define what data is taken offline. Default local data groups are provided that you can edit.

▸ Tip

- You can set your personal options so that filters always open in *Simple* or *Detailed* mode.

1. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Modify Local Data Groups**.
2. In the **Local Data** dialog box, on the **Data Group** tab, open the data group that you want to edit. To create a new data group, on the Actions toolbar, click **New**.

The **Data Group** tab lists existing data groups criteria, grouped by record types used in the filter, such as **Competitor** or **Cases**. Each row represents one set of filter criteria, and contains three columns: the field to use in the filter (for example, **Account Name** or **City**), the query relational operator (for example, **Equals** or **Contains**), and the value to filter on (for example, *Open*).

3. To edit a filter criteria row, click the field and select a different field, or click the query relational operator and select a different operator, or click the value, and enter a new value. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
4. To add a criteria row:
    a. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
    b. Click the query relational operator, and select an operator.
    c. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
5. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.
    a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.
    b. On the Filter toolbar, select **Group AND** or **Group OR**.
    c. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
    d. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
    e. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
    f. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.
    g. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.
    h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button for that row, and then click **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click the **Options menu** button for that row, and then click **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click the **Options menu** button for that row, and then click **Show in Simple Mode**.

Synchronizing Information

While you are online with Microsoft Dynamics CRM for Microsoft Office Outlook, changes you make to tracked records in Outlook or Microsoft Dynamics CRM are immediately visible to others. Changes that others make to Microsoft Dynamics CRM are immediately visible to you. Changes that others make to records you are tracking in Outlook, may not be visible in Outlook for up to 15 minutes.

For example, you create a contact in Outlook, and track it. All the other online users will be able to view it in Microsoft Dynamics CRM when it is saved. If another user changes the contact in Microsoft Dynamics CRM, then it could take up to 15 minutes for you to see the change in the Outlook contact, however if you chose to "View in CRM" you would see the change immediately.

If you are working offline, your changes are "stored" in your local data, which was updated when you went offline. Changes you make to tracked records in Outlook are also made in your local copy of the corresponding record. When you go back online, your changes are made to the Microsoft Dynamics CRM server and visible to everyone and the current data is available to you.

The Microsoft Dynamics CRM address book is synchronized separately and on a different schedule.

Synchronizing and Tracking Microsoft Dynamics CRM Data with Outlook

Also, you can track messages and records in Microsoft Dynamics CRM by linking the record to a Microsoft Dynamics CRM record. The process of linking a record is as simple as selecting one or more records, clicking a button on the toolbar, and then selecting a related account or contact. You can select an option to change the message icon to indicate a tracked record. You can link a record at any time and all replies to linked e-mail messages are also tracked. Tracked e-mail messages, contacts, tasks, and appointments are updated to Microsoft Dynamics CRM immediately while you are online. If you are offline, these items are updated in your local data and will be synchronized with the Microsoft Dynamics CRM server when you go back online.

More information: Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records

You can also set up your contact options to copy all your selected contacts from the Microsoft Dynamics CRM server into your Outlook **Contacts** folder.

More information: Set Personal Options

Synchronizing Microsoft Dynamics CRM and Local Data

If you have Microsoft Dynamics CRM for Outlook with Offline Access you can work offline with a pre-defined set of Microsoft Dynamics CRM data that is on your computer. This is your local data and what data is copied is defined in a local data group. Microsoft Dynamics CRM for Outlook updates your local data every time that you go offline and every time that you go back online. You can update your Microsoft Dynamics CRM information by connecting to the Microsoft Dynamics CRM server either where you have high-speed network access (high bandwidth), such as at your office, or through a dial-up modem account, such as in your hotel room when you are traveling.

Updating your local data when you go offline or online can take an extended period of time. To go online and offline more quickly, you can turn on an option to update local data in the background. After you manually synchronize the first time, when you are online your business's Microsoft Dynamics CRM data updates your Microsoft Dynamics CRM for Outlook local data on a regular schedule, also typically every 15 minutes, or on a schedule your system administrator sets up. You can set your personal options to synchronize your local data with Microsoft Dynamics CRM more frequently.

If you synchronize your data regularly, either by manually synchronizing or setting your options to synchronize your offline data periodically in the background while you are online, you can make sure that you have up-to-date information and you can reduce the synchronization time.

More information: Set Personal Options

This address book is synchronized with Microsoft Dynamics CRM automatically when you start Outlook and then once every 24 hours. If you make changes or additions to the address book that you need to access immediately, you can start a manual synchronization.

More information: Synchronize Data

Data Loss Prevention During the Synchronization Process

To prevent data loss, when you go offline Microsoft Dynamics CRM synchronizes data from the server to your local data, and then applies all of your changes to the server. All server transactions post completely before records are erased from your local data.

If you create a record offline that is identified by the system as a possible duplicate, you can set whether or not to create a duplicate record.

When you run a synchronization process, Microsoft Dynamics CRM overwrites existing information without verifying or comparing the last saved date. For example, if you changed a record a week ago but do not synchronize that record, and then someone else changes that same record earlier today and you run a synchronization process in the afternoon, your changes will overwrite the other person's even though your changes are older. However, if you and another user change different data, both changes are saved. For example, if you have a customer named *Jeff Smith*, and you change his first name to *John*, and another user changes his last name to *Rodman*, when you both synchronize your data, the customer's name becomes *John Rodman*.

Synchronize Data

There are two types of synchronization with Microsoft Dynamics CRM for Outlook : synchronization with Outlook and synchronization with local data.

If you have Microsoft Dynamics CRM for Outlook with Offline Access installed on your computer, you can work offline with Microsoft Dynamics CRM data. When you go offline, Microsoft Dynamics CRM copies a subset of the data on the Microsoft Dynamics CRM server to your computer. This local data is defined by a local data group and by the synchronization options set in your personal options.

After you go back online, changes you made to your local data are updated to the Microsoft Dynamics CRM server. If you encounter problems during synchronization, you are given choices on how to continue. You may also be notified of duplicate records.

Set synchronization options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select which record types you want to synchronize between Outlook and Microsoft Dynamics CRM for Outlook and how often you want to synchronize between applications. This tab is not available in the Web application.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Options**.
3. In the **Set Personal Options** dialog box, on the **Synchronization** tab, you can select which record types are synchronized:

- **Appointments I'm attending**
  Select this option if you want to synchronize appointments and service activities in which you are a participant and have accepted the appointment.
- **My tasks**
  Select this option if you want to synchronize tasks that you own in Microsoft Dynamics CRM.
- **Contacts**
  Select this option if you want to synchronize contacts that you own in Microsoft Dynamics CRM.
  If you delete a contact you own in Microsoft Dynamics CRM or in Microsoft Dynamics CRM for Outlook, it will not be deleted in the other application.
- **My phone calls**
  Select this option if you want to synchronize phone calls that you own in Microsoft Dynamics CRM.
- **My letters**
  Select this option if you want to synchronize letters that you own in Microsoft Dynamics CRM.
- **My faxes**
  Select this option if you want to synchronize faxes that you own in Microsoft Dynamics CRM.

4. If you want to include company names from Outlook contacts, select **Update Company fields with parent account names**.
   Important: This setting only affects newly tracked contacts. Future changes are not synchronized.
5. If you have more than one computer running Microsoft Dynamics CRM for Outlook, select this computer to be the synchronizing client.
6. If your organization permits it, you can define how often Microsoft Dynamics CRM items in your Microsoft Dynamics CRM for Outlook folders are updated:
   - **Synchronize the CRM items in my Outlook folders every**
     Select this option and select the number of minutes. You can increase the amount of time between synchronization of items in your Microsoft Dynamics CRM for Outlook folders. Your administrator sets the minimum time allowed between synchronization.
7. Select how duplicates are handled during synchronization:
   - **Create the duplicates**
     This option allows records to be created even if key fields contain the same data.
     More information: Avoiding Duplicate Records
   - **Do not create duplicates**
     This option blocks records from being created if key fields contain the same data.
8. To save your changes and close the dialog box, click **OK**.

Set address book options in Microsoft Dynamics CRM for Outlook

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can select how the address book is managed in Outlook and Microsoft Dynamics CRM for Outlook and how often you want to synchronize between applications. This tab is not available in the Web application.

1. Start Outlook. (Microsoft Dynamics CRM for Outlook must be installed.)
2. On the Microsoft Dynamics CRM menu bar, click **Options**.
3. In the **Set Personal Options** dialog box, on the **Address Book** tab, you can select how contacts and other record types are synchronized, and whether or not e-mail recipients are linked to Microsoft Dynamics CRM records.
4. By default, the Outlook Address Book is synchronized with the Microsoft Dynamics CRM address book every 24 hours. If your organization permits it, you can change this interval. To change this interval, change the number between 1 and 60. Your administrator sets the minimum time allowed between synchronization.
5. To save your changes and close the dialog box, click **OK**.

Note

If you want to synchronize your address book manually, synchronize Microsoft Dynamics CRM manually. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Synchronize Outlook with CRM**.

Define filters for data to take offline

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You use local data groups to define what data is taken offline. Default local data groups are provided that you can edit.

Tip

- You can set your personal options so that filters always open in *Simple* or *Detailed* mode.

1. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Modify Local Data Groups**.
2. In the **Local Data** dialog box, on the **Data Group** tab, open the data group that you want to edit. To create a new data group, on the Actions toolbar, click **New**.

   The **Data Group** tab lists existing data groups criteria, grouped by record types used in the filter, such as **Competitor** or **Cases**. Each row represents one set of filter criteria, and contains three

columns: the field to use in the filter (for example, **Account Name** or **City**), the query relational operator (for example, **Equals** or **Contains**), and the value to filter on (for example, *Open*).

3. To edit a filter criteria row, click the field and select a different field, or click the query relational operator and select a different operator, or click the value, and enter a new value. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
4. To add a criteria row:
    a. In the area for the record type that the field belongs to, click **Select**, and specify the field to filter on.
    b. Click the query relational operator, and select an operator.
    c. Click **Enter Value**, and enter a value to filter on. For some values, you can click the **Select Values** button to open the **Select Values** dialog box and select the value you want.
5. To group criteria, you must select two or more rows for the same record type. For example, **Sales Stage** and **Est. Revenue** are both field values in the **Opportunity** record type and two rows that specify filter criteria for these fields can be grouped. However, rows with field values from different record types, such as **Account** and **Opportunity** record types, cannot be grouped.
    a. For each row you want to group, in detailed mode, click the **Options menu** button for that row, and then click **Select Row**.
    b. On the Filter toolbar, select **Group AND** or **Group OR**.
    c. To remove a row from a group, click the **Options menu** button for that row, and then click **Delete**.
    d. To select a group, click the **Options menu** button for that group, and then click **Select Group**.
    e. To add a criteria clause to a group, click the **Options menu** button for that group, click **Add Clause**, and then select the field, query relational operator, and value.
    f. To unselect a group that has been previously selected, click the **Options menu** button for that group, and then click **Deselect Group**.
    g. To ungroup a group, click the **Options menu** button for that group, and then click **Ungroup**.
    h. To change a **Group AND** group to a **Group OR** group, or a **Group OR** group to a **Group AND** group, click the **Options menu** button for that group, and then click **Change to OR** or **Change to AND**.

Tips

- To clear all criteria and start over, on the Filter toolbar, click **Clear**, and then click **Confirm**.
- To delete a row, click the **Options menu** button for that row, and then click **Delete**.
- To hide a row in simple mode, while you are in detailed mode, click the **Options menu** button for that row, and then click **Hide in Simple Mode**.
- If you have a hidden row when viewing filter criteria in simple mode and you want to show that row again, then in detailed mode, you must click the **Options menu** button for that row, and then click **Show in Simple Mode**.

Synchronize with Microsoft Outlook manually

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

Outlook and Microsoft Dynamics CRM for Outlook regularly synchronize linked data. You can change how often this data is synchronized and what data is synchronized in your personal options.

More information: Set Personal Options

You can update linked data manually with the following procedure. This procedure does not take you offline, nor does it update your offline data.

1. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Synchronize Outlook with CRM**.
2. In the **Synchronizing Microsoft Dynamics CRM Data** dialog box, click **Details** to view the progress of the synchronization. You can view information on the following tabs:
   - **Tasks.** This tab displays information about the number of records and activities that are being synchronized.
   - **Errors.** This tab displays an explanation of any errors that occur during the synchorization process, so that you can correct them.

Notes

- To view the tasks and errors of the last synchronization, on the Microsoft Dynamics CRM menu bar, click **Synchronization Progress**.
- If you receive the error message "CRM server Not Found", verify that you have Internet connectivity and that the Microsoft Dynamics CRM server is running and then try again.
- Duplicates are not detected if you are offline. Duplicate detection may also occur when you synchronize or go back online.

Resolve potential duplicate records.

1. If the system detects that your record might be a potential duplicate, instead of saving the record, you'll see the **Duplicates Detected** dialog box.
2. To open a record to make sure it is a potential duplicate, in the **Potential duplicate records** list, double-click the record.
   - If the duplicate-detection rule identified potential duplicate records in other record types, review records from each record type listed.
3. If your new or updated record is not a duplicate, to create the new record, click **Save Record**.

   – OR –

   If your new or updated record is a duplicate, to cancel your changes, click **Cancel**.

Notes

- If you enter a duplicate record within a few minutes of entering the first record, Microsoft Dynamics CRM will not detect the duplicate record. The matchcodes for new and updated records are created every five minutes, rather than as a record is created.

Duplicate detection can take place only if duplicate detection is enabled in **Duplicate Detection Settings** and if at least one duplicate-detection rule exists for the record type. More information: Avoiding Duplicate Records

Go offline

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: Common Task Permissions

You can go offline if you have installed Microsoft Dynamics CRM for Outlook with Offline Access and have offline permissions.

Whenever you go offline, data is synchronized between Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook to ensure that you have access to the latest data on your computer.

Whenever you go back online, the changes you've made to your local records are uploaded to the Microsoft Dynamics CRM database.

You can also update your local data periodically while you are still online. This reduces the time it takes to synchronize before going offline. This interval is set in your personal options.

More information: Set Personal Options

1. In Outlook, on the Microsoft Dynamics CRM toolbar, click **Go Offline**.
   You can track the progress of the records as they are updated in the **Synchronizing Microsoft CRM Data** dialog box.
2. To view the details of the synchronization, click **Details**. To receive a confirmation that the synchronization is complete, select the **Show Confirmation When Complete** check box.
3. If the check box is selected, click **OK** to close the confirmation message and to complete the update.
   The Windows notification area displays the **Microsoft Dynamics CRM for Outlook Not Signed In** icon and the button on the Microsoft Dynamics CRM toolbar changes to **Go Online**. Other options may also change.

Notes

- When you go back online, your data will be re-synchronized with Microsoft Dynamics CRM and Microsoft Dynamics CRM for Outlook, and you may be notified of any duplicate records. More information: Avoiding Duplicate Records
  To go back online, on the Microsoft Dynamics CRM toolbar, click **Go Online**.
- If you attach a file to a Microsoft Dynamics CRM record while you are working offline, the attached files must be available in the same location when you synchronize your data in order to be uploaded to the Microsoft Dynamics CRM database. For example, if you are visiting a customer and you borrow a disk with a file that you want to attach to the customer's record, first copy the file to your local hard drive, then attach it from there. After you've synchronized your data and the attachment file has been uploaded to the Microsoft Dynamics CRM database, you can delete your local copy.

Resolve data synchronization errors

Can I do this task?

This task requires permissions that are found in all default security roles. More information about specific permissions and performing this task while offline: E-mail Permissions

During synchronization, if you encounter errors that prevent some of your Microsoft Dynamics CRM data from being synchronized when you go online, the **Synchronizing Microsoft Dynamics CRM Data** dialog box opens, and the **Error** tab displays the list of errors.

1. In the **Synchronizing Microsoft Dynamics CRM Data** dialog box, choose one of the following options:

   - **Finish going online and do not save the data changes made offline**
     Choose this option when you are unable to fix or change errors, for example, if you no longer have access to a record or the record has been deleted. You can also choose this option if you've made minor changes that can be discarded or updated later.
     Important Discarding changes made while offline does not revert those changes. You will need to revert those changes manually.
   - **Stay offline and try to fix the errors so all the data will synchronize**
     Choose this option if you want to attempt to fix the errors by using the information provided in the **Synchronizing Microsoft Dynamics CRM Data** dialog box. Any data entered or changed after you went offline will be lost. If you know which records you have added or changed, you can print them out so you can reenter the data later.
   - **Resolving Possible Duplicate Records** If duplicates are detected during synchronization, you can resolve them.

     More information: Check for Duplicates

2. Click **OK** to continue.

   . The **Synchronizing Microsoft Dynamics CRM Data** dialog box will appear again. If the problem cannot be fixed, use the Web application to open the server version of the records that caused synchronization errors. Compare changes between each server version and the version you have in Microsoft Dynamics CRM for Outlook, and make your changes to the server version. When all the server versions of the items have been updated, go online and discard the changes you made offline.

Troubleshooting

Accessing Parts of the Application - Troubleshooting

I'm a system administrator. Why don't I don't see the Sales, Marketing, or Service areas?

If your user record has the **Access Mode** set to **Administrative**, you cannot access the Sales, Marketing, or Service areas of Microsoft Dynamics CRM, or any of the entities in those areas. This access mode allows your organization to create a user for a member of the IT department for administering and customizing Microsoft Dynamics CRM without using up a seat from your Microsoft Dynamics CRM license.

To see the areas, the access mode must be set to either **Full** or **Read-Only**.

To change the access mode:

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.
2. Double-click your user record.
3. In the **Client Access License (CAL) Information** section, in **Access Mode**, select either **Full** or **Read-Only**.
4. Click **Save and Close**.

Related Topics

Troubleshooting

Managing Users

Why is an area, field, button, or action dimmed or missing?

When you read the Help, you may find that a task is described, but that the item is dimmed or not visible to you in Microsoft Dynamics CRM. The areas, fields, buttons, and actions that you have access to are controlled by your security role.

For example, if the Schedule Manager or Scheduler security role is the only security role assigned to your account, you have permission to do tasks related to service scheduling, but not to other areas of the application, so the Sales area would not be visible.

It is also possible that your system administrator customized your security role. For example, some organizations control how new accounts are added by removing the Create privilege from many security roles. If your security role was missing the Account Create privilege, the accounts list you see would not include **New**.

Here's another example: you have a Salesperson security role and assign an account record to another user. When you open the record, **Assign** is no longer on the **Actions** menu. It's not there because you no longer own the record, and you only have the Assign privilege on account records you own.

If you are curious about what privileges are assigned to your security role, all default security roles allow you to browse the Users and Security Roles areas.

View the security roles you are assigned

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.
2. Find yourself in the list, and double-click your name.
3. Click **Roles**, and then see which roles you are assigned.
4. Double-click each security role you are assigned, and then click each tab to see the privileges that are associated with this role.

If you don't have permission to do a required task, contact your manager or system administrator.

For any record, you can also check what permissions you have.

To see your permissions on a record

1. With the record open, click the **File menu** button, and then click **Properties**.
   The privileges selected under **Security** indicate which permissions you have for this record.

Related Topics

Troubleshooting

Controlling Data Access

Can I make a record private?

A record is private only if all security roles only include the Read privilege at the User for the record type, and if the record has not been shared.

For example, by default, all security roles include the Read privilege at the Organization level for contacts, accounts, and activities, so unless security roles have been customized in your organization, account, contact, and activity records are not private.

A user cannot reduce privileges that are granted in security roles.

Related Topics

Troubleshooting

Work with Security Roles

Controlling Data Access

Why did the Settings button in the Navigation Pane of the Microsoft Dynamics CRM Web application disappear?

Some features in the Settings area are not available if you are offline or if you do not have permissions to access the area. Contact your system administrator to update your permissions.

More information: Working Offline

Related Topics

Troubleshooting

Doing CRM Work in Outlook

Synchronizing Information

Why are some areas or features missing in my Microsoft Dynamics CRM for Outlook folders?

- If you are offline, some data, areas, and features are not available to you. You can tell if you are offline if any of the following appear in your Microsoft Dynamics CRM for Microsoft Office Outlook :
  - The Windows notification area displays the **Microsoft Dynamics CRM for Outlook offline** icon .
  - The Microsoft Dynamics CRM toolbar displays the **Go Online** button.
  - The Microsoft Dynamics CRM menu bar displays the the **Go Online** option.

  If you are offline, you can go back online by clicking the **Go Online** button. You can set up local data groups to define what data you take offline.

  More information: Working Offline

- You may not have permissions to access specific areas or features. Contact your system administrator.

Why can't I view my Microsoft Dynamics CRM calendars in Outlook?

- If you are offline, the Service calendar is not available in Microsoft Dynamics CRM for Microsoft Office Outlook.
- If you are in Microsoft Dynamics CRM for Microsoft Office Outlook, the Workplace calendar is not available, unless the Site Map has been customized.
- If you cannot view the Service calendar, you do not have the Read privilege for the Service record type. This might be because you have custom or edited security roles. The Read privilege for the Service record type is included in all the default security roles available in Microsoft Dynamics CRM.

  To make the calendar visible for users with a specific security role, click **Settings**, click **Security Roles**. Open the security role. On the **Service Management** tab, for the **Service** record type, add the **Read** privilege.

Entering Data – Troubleshooting

How do I copy a record?

It is not possible to copy a record.

Tip

If you need to add multiple records with similar data, you can save time by using the Import Data Wizard:

1. Create an Advanced Find search that includes all the columns that have data for the record, and displays any records that you want to use as original records for copying.
2. Export the results of the Advanced Find search into a Microsoft Office Excel worksheet.
3. In the worksheet, copy the row as needed, and edit the new rows.
4. Save the worksheet as a comma-separated values file.
5. Import the records.

Related Topics

Troubleshooting

Work with Imports

How do I link address information between accounts and contacts?

If you use a link from the **Details** area of one record to create a related record, address fields are mapped. In this case, information from the open record populates the new record. For example, a new record created by either of the following actions includes address data from the first record:

- From an open contact record, click **Sub-Contacts**, and then click **New Contact**.
- From an open account record, click **Sub-Accounts**, and then click **New Account**. Alternatively, click **Contacts**, and then click **New Contact**.

If you create a new account or contact record in any other way, address data is not mapped.

Related Topics

Troubleshooting

Work with Accounts

Work with Contacts

Managing Accounts and Contacts

What if there isn't a field for information I need to enter?

If the data you want to track doesn't match the fields on a form, ask your system administrator or system customizer to customize the form.

They can make the following changes to forms:

- Remove fields you don't need.
- Add new fields.
- Change the order in which fields appear to match the order in which you enter data.
- Change the tab order of fields to match the order in which you enter data.
- Change the values listed, or the default value, for drop-down fields.

Related Topics

Troubleshooting

Requesting User Interface Changes

Customizing Entities

Work with Entities

What if I need new options in a drop-down list?

If the value you need is not in a list, such as the subject list or the reasons for closing a record, lead sources, or industry types, ask your system administrator or system customizer to customize the list.

They can make the following changes to lists:

- Remove values that are not needed.
- Add new values.
- Change the order in which the values are displayed.
- Set or change the default value for the list.
- Remove the default value requirement.

Related Topics

Troubleshooting

Requesting User Interface Changes

Customizing Entities

Work with Entities

Controlling Data Access

How do I change the default value for a field?

Two types of fields can have default values: Boolean (bit) fields and drop-down (picklist) lists. Contact your system administrator or system customizer with your suggestion for changing a default value.

If you want default values in other types of fields, your system administrator or system customizer can add onLoad events to the field. More information: Form Scripting

Related Topics

Troubleshooting

Requesting User Interface Changes

Form Scripting

Why do I get a "No resources selected for this activity" message when I create an appointment or activity?

This error occurs if you have not selected a required resource for a service activity or appointment while creating the activity. You can continue to save the activity.

If the service activity or appointment is for your own use, be sure to add yourself as a resource, or the activity will not appear on your Workplace calendar, but will appear in the Service calendar. If you are using Microsoft Dynamics CRM for Microsoft Office Outlook and do not select yourself as a resource, the appointment or service activity will not synchronize with your Outlook calendar.

Related Topics

Troubleshooting

Working with Appointments

Booking Service Activities in the Service Calendar

What does the message mean that I get when I create or schedule a service activity?

There are several messages that you might receive while creating or editing a service activity. These are usually related to the lack of availability of resources for the service activity.

- **The resources available for the selected dates or times do not meet the minimum resource requirements for this service.**
  There are not any resources available to perform this service. If you have selected a specific time or date or range of times and dates, there may be no resources scheduled during that time. Remove those criteria and try again. If you continue to see this message, ask your system administrator to confirm that resources have been assigned to perform the service.
- **Service Selection Rules for the required resource (user name) cannot be met. To see selection rules, open the record for this service.**
  The resource requested does not meet the minimum requirements of the service, for example, the resource may not be part of a defined resource group for the service. Remove or select another resource from the search query and try again. If you continue to see this message, ask your system administrator to confirm that resources have been assigned to perform the service.
- **No results found. Try choosing different dates or letting the system choose your resources automatically.**
  If you continue to see this message, ask your system administrator to confirm that resources have been assigned to perform the service.

Related Topics

Troubleshooting

Scheduling Users and Other Resources

Entering Data - Troubleshooting

Why does the contract that I created to track cases and activities by minutes track by the number of cases instead?

There are two types of allotment types, one tracks the number of cases opened per contract and the other tracks by total minutes spent on activities for the case. First, verify that the contract template used to create the contract has the correct allotment type. If not, you will need to cancel the contract and create a new one that uses a contract template with the correct allotment type.

This issue can also occur if the contract was created from the related records for an account. When the contract is created, the system can associate only one record with the contract, which is the account. The contract template is lost. If this occurs, recreate the contract from the Contracts list in the Service area, and then re-associate any cases or activities.

Related Topics

Troubleshooting

Creating Contract Templates

Finding Data – Troubleshooting

Why are some fields missing from the list in Advanced Find?

In Advanced Find, when you click **Select**, some fields from each entity may not be listed. For example, by default, the **Relationship Type** field (customertypecode) is not listed for accounts and contacts.

A person with the System Administrator or System Customizer security role can specify which attributes are available for Advanced Find. This requires editing the properties of the attribute in the Customization area to set **Searchable** to **Yes**. When an attribute is set as searchable, it is also included in the list of available find columns, used during customization of the Quick Find View and the lookup view. More information: Create or Edit Entity Attributes

Related Topics

Troubleshooting

Work with Advanced Find

How can I select records from multiple results pages?

You can select multiple records on one page in a list by holding down the CTRL key while you click the other records that you want. However, you cannot select multiple records from multiple pages.

You have two options if you need to select records that are on multiple results pages:

- Use Advanced Find to narrow the list so that all records show up on one page.
- Change your personal options so that more records are displayed on each page. By default, the Microsoft Dynamics CRM Web application displays 50 records per page. You can increase the number of records displayed and thereby increase the number of records you can select at one time. To display up to a maximum of 250 records per page:

  1. On the **Tools** menu, click **Options**.
  2. On the **General** tab, in the **Records Per Page** list, select the number of records to display per page.
  3. Click **OK**.

  This changes the number of items that is displayed for all lists, which may slow response time when you switch record types. Therefore, you might want to set it back to a smaller number when you are done with this bulk action.

Related Topics

Troubleshooting

Work with Advanced Find

How can I find all records that don't have a related record?

Advanced Find cannot find all records of one record type that don't have a related record. For example, you cannot use Advanced Find to find all cases that have not received a phone call within the last week.

There are two options for finding out this type of information:

- Use one of the default reports in Microsoft Dynamics CRM for common queries, such as Neglected Cases, Neglected Accounts, and Neglected Leads.
- Use Microsoft Office Excel and create a query directly from the Microsoft Dynamics CRM database. This requires an understanding of how Microsoft Dynamics CRM data is stored in the database, and of how to use Microsoft Query, a built-in query language used in Excel. For an article that provides step-by-step instructions, see **Learn More**.

Related Topics

Troubleshooting

Neglected Cases Report

Neglected Accounts Report

Neglected Leads Report

Write a Report Using Report-Writing Tools

Work with Advanced Find

Customizing and Organizing Reports

How can I create a view or export data that includes fields from related records?

Advanced Find search results can include fields from related records.

To specify fields from related records in Advanced Find:

1. Click **Advanced Find**.
2. Click **Edit Columns**, and then click **Add Columns**.
3. Select the related record type, select the columns from that record type, and then click **OK**.
4. Click **OK** again to close the **Edit Columns** dialog box.

Note: You cannot sort Advanced Find search results based on a column from a related record. If you need to sort by a column from a related record, export your list to a Microsoft Office Excel worksheet or PivotTable, and sort the data there.

Related Topics

Troubleshooting

Write a Report Using Report-Writing Tools

Export Data to Excel

Work with Advanced Find

Customizing and Organizing Reports

How can I save an Advanced Find view as my default view?

You cannot use an Advanced Find saved view as your default view.

If you create a view that you think should be the default view for all users, ask your system administrator or system customizer to create that view.

Related Topics

Troubleshooting

Requesting User Interface Changes

Customizing Entities

Work with Views

Exporting Data to Excel – Troubleshooting

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4. Click **OK** again to close the **Edit Columns** dialog box.

Note: You cannot sort Advanced Find search results based on a column from a related record. If you need to sort by a column from a related record, export your list to a Microsoft Office Excel worksheet or PivotTable, and sort the data there.

Related Topics

Troubleshooting

Write a Report Using Report-Writing Tools

Export Data to Excel

Work with Advanced Find

Customizing and Organizing Reports

When I export data to a Microsoft Office Excel dynamic worksheet or PivotTable, why do I receive a "Connection failed. Reason: not associated with a trusted SQL connection" error?

This error occurs if you are accessing Microsoft Dynamics CRM from a different domain than the domain that Microsoft Dynamics CRM is installed on.

To export a list of records to a dynamic Microsoft Office Excel worksheet or PivotTable, your computer must be on the same domain as the domain of the Microsoft Dynamics CRM server. If you are on a different domain, you can export a static worksheet.

Related Topics

Running Reports - Troubleshooting

Export Data to Excel

Running Reports and Analyzing Data

Importing Records – Troubleshooting

How do I leave some fields in my source file unmapped?

If you are using a data map for your import, you can specify that you want to ignore a column by selecting the column and then clicking **Ignore**. More information: Work with Data Maps

If you are using automatic mapping in the Import Data Wizard, every field in your source file must be mapped to a unique field in Microsoft Dynamics CRM. All columns in your file will be imported. You have two options:

- Remove columns from your source data that you do not need in Microsoft Dynamics CRM. The easiest way to do this is to make a copy of your source file, and open it with Microsoft Office Excel. Delete unused columns, and then save the file as a comma-separated values (.csv) file.
- Customize the entity in Microsoft Dynamics CRM and add new attributes so that there is a destination for each source field in Microsoft Dynamics CRM.

Related Topics

Work with Imports

Importing Data

What are some common reasons a record might fail to import?

When you are troubleshooting data imports, make small files with one or two records. It is much easier to locate the source of the problem when you are importing a small batch. To ensure a successful import, be sure to follow the steps in **Prepare a file for import**. More information: Work with Imports

- Common error messages and suggested resolutions:

  ▸ A SQL Server error occurred. For more information, contact your system administrator.

  This message indicates that a value in the source file exceeds the maximum number of characters that can be entered for the field. For example, a value for the Street field in a lead import exceeds the 50-character limit.

  To fix this error, reduce the number of characters in the field, and then run the data import again.

  ▸ The lookup reference could not be resolved.

  Each entity in Microsoft Dynamics CRM has named lookup attributes that are used to connect one record with another record. For example, the Campaign Response entity has a required attribute, Source Campaign (campaignid).

  To fix this error, change the value to be a valid Microsoft Dynamics CRM globally unique identifier (GUID).

- The number of fields is different than the number of column headings.

This error occurs when the number of columns that are present in the data row differ from the number of columns present in the column headings (or header row) of the source file. For example, if you have two column headings in a contacts file, but try to import three columns of data, the third column does not have a column heading.

To fix this error, open the source file in Microsoft Office Excel and add missing column headings or data. Save the file as a comma-separated values (.csv) file.

- The list value is not mapped.

This error can occur if you are using an automatic map and the source file includes a column that is mapped to a drop-down list.

To fix this error, create a data map to use with this import, and map the list values.

- A record was not created or updated because a duplicate of the current record already exists.

This error occurs when you are trying to import a record that has a potential duplicate in the system. Potential duplicates are determined based on current, published duplicate detection rules for the record type that you are importing.

If the record you are trying to import is not a duplicate, determine the criteria used for identifying duplicates for that type of record, and modify the record so that it doesn't match the duplicate criteria.

- An error has occurred. For more information, contact your system administrator.

This error can occur if the format of data in one field in the row does not match what is expected in Microsoft Dynamics CRM. For example, you will receive this error if you have a text string instead of a date or a misformatted date in the **Birthday** field in a contact record.

To fix this error, correct the format of any non-string fields in the row.

- Non-printable characters found.

For example, if the source data had paragraphs in the Description field, the Description field may have embedded carriage return/line feed (CR/LF) characters.

To fix this error, save the file with Unicode or UTF-8 encoding. You can do this by using the following steps:

1. Start Notepad.
2. Open your comma-separated values source file.
3. On the **File** menu, click **Save As**.

4. In the **Encoding** list, click **Unicode** or **UTF-8**.

The source data is not in the required format.

For example, a picklist may have a field that is not mapped to a valid CRM field.

To fix this error, ensure that non-empty valid values are mapped to the CRM field

Related Topics

Work with Imports

Importing Data

Why can't I process potential duplicate records as part of importing records?

If you select duplicate detection when you start a data import, when potential duplicate records are detected as part of importing records, the potential duplicate records are not imported. You are not offered a choice for each record of whether to merge the records or delete or deactivate one of the records.

If you want to have a choice for each potential duplicate record, turn off duplicate checking during import, and after the import job finishes, run duplicate detection to process potential duplicate records.

Related Topics

Work with Imports

Work with Duplicate-detection Jobs

Why are numbers rounded when I import data?

When an attribute of the type decimal, money, or float is created in Microsoft Dynamics CRM, the precision, or number of decimals, is defined. If the number of decimals in the source data is more than the number that is specified for the attribute in Microsoft Dynamics CRM, the imported floating-point data is rounded to the number of decimals defined in the attribute definition. The precision value cannot be changed after an attribute is created.

Related Topic

Work with Imports

When I import subjects, why don't they appear in the list of subjects?

For imported subjects to be visible, the import source file must contain a column that maps to the **Feature Mask** attribute. The **Feature Mask** attribute determines whether the subject will be displayed in the subject tree. If **Feature Mask** is set to 1, the subject will be displayed. If it is empty or set to 0, the subject will not be displayed.

To build the subject hierarchy in the subject tree, you map the column in the source file that contains the title of the parent subject to the **Parent Subject** attribute. If no parent subject is provided, the subject will appear at the top level of the hierarchy.

Related Topics

Importing Data

Work with Imports

Supporting Customer Service with Microsoft Dynamics CRM

Work with Subjects

Why do I receive the message: "An error has occurred. For more information, contact your system administrator" when I am creating duplicate-detection rules, running duplicate detection, importing records, or saving data maps?

Some Microsoft Internet Explorer add-ons can interfere with creating duplicate-detection rules, running duplicate detection jobs, importing records, and saving data maps.

To see whether Internet Explorer is the cause of the error, try disabling Internet Explorer add-ons, one at a time:

- On the Internet Explorer **Tools** menu, click **Manage Add-ons**, select an add-on, and then select **Disable**.
- Retry the task that generated the error message. If you get the same error, enable the add-on that you previously disabled, and then try disabling a different add-on.
- Repeat this process for all enabled add-ons until you find the one that must be disabled.

Related Topics

Work with Imports

Work with Duplicate-detection Jobs

Configuring the Application – Troubleshooting

After I modify a security role, why does an entity disappear?

A security role must have the Read privilege for an entity in order for it to appear anywhere in the application.

If an entity is no longer visible to a user, make sure the security role includes Read privilege for the entity.

Related Topics

Troubleshooting

Work with Security Roles

Controlling Data Access

Can I make a record private?

A record is private only if all security roles only include the Read privilege at the User for the record type, and if the record has not been shared.

For example, by default, all security roles include the Read privilege at the Organization level for contacts, accounts, and activities, so unless security roles have been customized in your organization, account, contact, and activity records are not private.

A user cannot reduce privileges that are granted in security roles.

Related Topics

Troubleshooting

Work with Security Roles

Controlling Data Access

Sending E-mail Messages – Troubleshooting

When I send an e-mail message to someone in my organization, why are two

e-mail activities created?

Microsoft Dynamics CRM is designed to create multiple e-mail activities for e-mail messages sent to users inside your organization, one activity for the person creating the e-mail activity and one activity for every recipient. You can turn off this feature.

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **System Settings**.
2. On the **E-mail** tab, clear the **Track e-mails sent between CRM users as two activities** check box.
3. Click **OK**.

Related Topics

Doing CRM Work in Outlook

Synchronizing Information

What are the extra numbers in the Subject line of my e-mail messages and how do I get rid of them?

The tracking token, which appears as a series of numbers and letters after the subject line of outgoing e-mail messages, is used to improve automatic linking of records between Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM. When used, it is generated automatically and cannot be removed from existing e-mail messages.

If you do not want the token to appear in future messages, you have the following options.

- Turn off the tracking token for the entire system.

  This option is set in the System Settings area. If you do not want to lose the functionality provided by the tracking token, you can shorten the tag by editing the auto-numbering options for the tracking token on the **E-mail** tab of the **System Settings** dialog box.

  More information: Manage System Settings

- Turn off the tracking token as mentioned, and for individual users, accept all incoming e-mail messages as Microsoft Dynamics CRM activities. This does not enable the marketing features. This option is set in your Personal Options.

  More information: Set Personal Options

Related Topics

Troubleshooting

Doing CRM Work in Outlook

Work with Subjects

Why do some e-mail addresses in the Send or From lines appear in red text?

A red e-mail address and the **Unresolved Address** button indicates that the address does not match any record in Microsoft Dynamics CRM. There are several reasons why an e-mail address can be in this state:

- **The e-mail address is not in Microsoft Dynamics CRM**.
  When you resolve the address, you can create a new account, contact, or lead with that e-mail address. New users need to be added by the system administrator before they can be resolved to the address.
- **The e-mail address is used by more than one record, for example, for both a contact and a user.**
  Microsoft Dynamics CRM is unable to determine which account to associate with the activity. When you resolve the address, you can select the appropriate account, contact, lead, or user.
- **The address was not included in your Microsoft Dynamics CRM Address Book**. To see what addresses are being reconciled and synchronized, in the **Set Personal Options** dialog box, click the **Address Book** tab.

To resolve an address, open the e-mail activity record and then double-click the address. The **Resolve Address** dialog box opens.

Related Topics

Troubleshooting

Using Microsoft Dynamics CRM for Outlook - Troubleshooting

Send Direct E-mail to Customers

Managing E-mail Activities

Why aren't my e-mail messages being tracked?

Not all e-mail messages are tracked automatically. Which e-mail messages are tracked is set in the **Set Personal Options** dialog box. You can choose to track all e-mail messages, only messages from Microsoft Dynamics CRM leads, contacts, or accounts, or only messages that are in response to tracked messages.

More information: Set Personal Options

Related Topic

Troubleshooting

Why are my e-mail messages not being sent or received?

You may not have your incoming and outgoing e-mail configurations set correctly. Verify your settings and e-mail address in your user record. If you do not have permission to change your user record, contact your system administrator.

More information: Work with Your User Record and Work Hours, Set Personal Options

Related Topics

Troubleshooting

Work with Your User Record and Work Hours

Set Personal Options

Sending E-mail Messages - Troubleshooting

Why am I receiving e-mail messages without some or all of the attachments?

Your system administrator may have chosen to block certain types of attachments, such as executable (.exe) files and batch (.bat) files. There is also a limit to the size of attachments allowed. Contact your system administrator for more information.

If you are the administrator, you can edit the list of blocked files and file size limit in the Settings area. More information: Manage System Settings

Related Topic

Manage System Settings

Creating Workflows – Troubleshooting

How can I close multiple activities at the same time?

You can close several activities at the same time by creating an on-demand workflow and then running it from the **Activities** list.

1. For each type of activity, create an on-demand workflow with one workflow step.

   More information: Work with Workflows
2. In the workflow step, add a workflow action to set the status of the activity to "Closed."
3. Publish each activity-specific workflow.
4. In the **Activities** list, select the activities that you want to close, and then apply the on-demand workflow.

   More information: Start an On-Demand Workflow

Related Topics

Start an On-Demand Workflow

Work with Workflows

Creating Workflows - Troubleshooting

Creating and Using Workflows

Why can't I run a workflow that has been shared with me?

You may not have the privilege to run the workflow. You need Execute Workflow Job privilege on the **Customization** tab.

If you are curious about what privileges are assigned to your security role, all default security roles allow you to browse the Users and Security Roles areas.

View the security roles you are assigned

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **Users**.
2. Find yourself in the list, and double-click your name.
3. Click **Roles**, and then see which security roles you are assigned.
4. Double-click each security role you are assigned, and then click each tab to see the privileges that are associated with this security role.

If you don't have permission to do a required task, contact your manager or system administrator.

Related Topics

Start an On-Demand Workflow

Work with Workflows

Creating Workflows - Troubleshooting

Creating and Using Workflows

Synchronization Issues with Microsoft Dynamics CRM for Outlook – Troubleshooting

Start Diagnostics Wizard

Microsoft Dynamics CRM Diagnostics detects and fixes many problems you may encounter with Microsoft Dynamics CRM for Outlook including issues with connectivity, setup, and corrupted data. In some cases, you can also choose to allow the wizard to repair the problem.

The wizard is installed on your computer at the same time you install Microsoft Dynamics CRM for Outlook.

1. On the **Start** menu, click **All Programs**, click **Microsoft Dynamics CRM**, and then click **Diagnostics**.
2. To start the wizard, click **Run Diagnostics**.

Note

If you are working with a support representative, you can enable tracking to assist the representative with diagnosing your problems.

- In the wizard, click **Support Mode**, run the wizard, and then on the **Advanced Troubleshooting** tab, click **Create File**. You can save the compressed file to your desktop, and then send it to your support representative.

Related Topic

Managing Users

Why aren't names for a newly tracked Microsoft Dynamics CRM appointment or e-mail being verified?

There are several reasons that this might occur:

- If none of the names are being verified, you may not have permissions to use the Microsoft Dynamics CRM address book. The CRM Address Book privilege is part of the Business Management security role. Contact your system administrator to review your security roles.
- The person may not have a valid e-mail address in the Microsoft Dynamics CRM record.
- The person may not have a valid customer or account record in Microsoft Dynamics CRM.
- The address book may not have been synchronized or is corrupted. To synchronize your address book, in Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM toolbar, point to **Synchronize with Microsoft CRM**, and then click **Address Book**.

Related Topics

Using Microsoft Dynamics CRM for Outlook - Troubleshooting

Doing CRM Work in Outlook

Synchronizing Information

Why can't I fix some of the synchronization errors before going offline?

- Not all errors can be fixed. For example, if a parent account has been deleted from Microsoft Dynamics CRM while you were offline. For these type of errors, delete the records, try to synchronize again, and then re-enter the data manually into Microsoft Dynamics CRM, while online. Some data may required changes.
- Appointments and service activities do not have access to scheduling information and may cause scheduling conflicts. These conflicts can be resolved by rescheduling or updating the schedule after going back online.

Related Topics

Using Microsoft Dynamics CRM for Outlook - Troubleshooting

Synchronize Data

Doing CRM Work in Outlook

Synchronizing Information

Why didn't my attachments synchronize?

There are several reasons why attachments may not synchronize:

- When you trackOutlook tasks and appointments with attachments, the attachments are not saved in the Microsoft Dynamics CRM record, but continue to exist with the original Outlook item. To include the attachment with the activity, save the file to the local drive of your computer, and then manually add the attachment to the Microsoft Dynamics CRM record.

  If you attach a file to a Microsoft Dynamics CRM record when you are working offline, the attached files must be available in the same location when you synchronize your data so that they can be uploaded to the Microsoft Dynamics CRM database. For example, if you are visiting a customer and you borrow a disk with a file that you want to attach to the customer's record, first copy the file to your local hard drive, then attach it from there. After you've synchronized the data and the attachment file has been uploaded to the Microsoft Dynamics CRM database, you can delete the local copy.

- Attachments above the maximum file size limit are not synchronized. The maximum attachment size is 5 MB. This can be increased by your system administrator.
- Your system administrator may have chosen to block certain types of attachments. Contact your system administrator for more information.

Related Topics

Using Microsoft Dynamics CRM for Outlook - Troubleshooting

Add a Note or Attach a File

Doing CRM Work in Outlook

Synchronizing Information

Why didn't an e-mail message in response to a tracked message get tracked?

This can happen when you have sent a message and received a response to it while you are offline with Microsoft Dynamics CRM. Microsoft Dynamics CRM did not have an opportunity to synchronize with the sent message before the response was received. Missed messages do not have the Microsoft Dynamics CRM **Track in CRM** button . You can track the message in Microsoft Dynamics CRM by clicking **Track in CRM**, and then selecting a **Regarding** record.

Related Topics

Using Microsoft Dynamics CRM for Outlook - Troubleshooting

Doing CRM Work in Outlook

Synchronizing Information

Why doesn't the time in Microsoft Dynamics CRM for Outlook match the time in Microsoft Dynamics CRM?

Microsoft Dynamics CRM for Microsoft Office Outlook uses the time zone set in Microsoft Office Outlook. Microsoft Dynamics CRM uses the time zone set on the computer running Microsoft Dynamics CRM or for the individual user. If they are different, this can cause issues.

To resolve this conflict, the system administrator must sign in to Microsoft Dynamics CRM as the user account that was used for installation. In the user's record, the system administrator needs to change the time zone to match the time zone on the computer that is running Outlook.

Related Topics

Set Personal Options

Using Microsoft Dynamics CRM for Outlook - Troubleshooting

Doing CRM Work in Outlook

Synchronizing Information

Why are Outlook appointments not appearing in the Microsoft Dynamics CRM calendars?

Microsoft Office Outlook appointments may not appear in the Microsoft Dynamics CRM calendars for several reasons:

- Individual appointments are not marked for tracking in Microsoft Dynamics CRM.

  Tracked items appear with the **Track in CRM** button , unless this option has been turned off.

- You are not selected as one of the attending parties:
  - In Outlook, you are not in the **To** box.
  - In Microsoft Dynamics CRM appointments, you are not in the **Required** or **Optional** boxes.
  - In Microsoft Dynamics CRM service activities, you must either be listed in the **Resources** box or in a Resource Group listed in the box.
- The option to synchronize **Appointments I'm attending** was not selected on the **Synchronization** tab of the **Set Personal Options** dialog box.

  More information: Set Personal Options

- The automatic synchronization has not occurred yet. It is usually scheduled for every 15 minutes. To force synchronization, in Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Synchronize Outlook with CRM**.
- Recurring appointments are not supported by this version of Microsoft Dynamics CRM. Only the initial appointment will appear. Make additional appointments manually, as appropriate.
- On a shared computer, you must be logged on with your own credentials. Otherwise, you might be viewing the calendar of the person who is logged on, instead of your own calendar. Log off and log on again with your user name.

Related Topic

Synchronizing Information

While trying to save an Outlook contact in Microsoft Dynamics CRM, why do I receive an error that the item is not valid for promotion?

There are several reasons why this message may occur:

- The message class of the contact, e-mail, task or appointment is not valid. For example: the default Contact form used by Outlook is IPM.Contact. This is usually because the contact was created using a custom Outlook form. You need to re-enter the contact, e-mail, task, or appointment.
- The contact is stored outside of the Exchange local store. You can copy the contact to the local store.
- The contact is stored in a deleted items folder. You can move the contact to a valid folder.

Related Topic

Working with Records and Activities in Microsoft Dynamics CRM for Outlook

Why is synchronization slow?

There are many factors that contribute to the speed of synchronization between Microsoft Dynamics CRM for Outlook and Microsoft Dynamics CRM.

To identify and fix many problems with Microsoft Dynamics CRM for Outlook, run Microsoft Dynamics CRM Diagnostics.

1. On the **Start** menu, click **All Programs**, click **Microsoft Dynamics CRM**, and then click **Diagnostics**.
2. To start the wizard, click **Run Diagnostics**.

Initial synchronization is typically slow because you are copying data to your computer. The speed of subsequent synchronization depends on the amount of data that you are synchronizing. Later synchronizations are faster because only changes and additions are being synchronized. The best strategy for speedier synchronization is to reduce the amount of data. Here are a few suggestions that might help speed up synchronization:

- Determine if you need to synchronize contacts, tasks, and appointments. If not, you can turn these off in the **Set Personal Options** dialog box. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Options**. In the **Set Personal Options** dialog box, on the **Synchronization** tab, you can select which record types are synchronized and how often.
- Increase how often your local data is updated. This reduces the amount of data to be updated when you go offline. In the **Set Personal Options** dialog box, on the **Offline** tab, select a shorter period of time.
- Reduce the type of e-mail recipients that are reconciled and therefore need to be synchronized. In the **Set Personal Options** dialog box, on the **Address Book** tab, select fewer options.
- Deactivate local data groups for areas you are not using in Microsoft Dynamics CRM for Outlook. To deactivate an active data group, on the **Data Groups** tab, select one or more data groups. On the toolbar, click the **Deactivate** button. This deactivates all of the data groups and moves them to the **Inactive Data Groups** tab.
- Modify the active data groups to ensure that they are only synchronizing the data you need offline. In Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM menu bar, click **Local Data**. Reduce the number of records that you own or share, including templates, contracts, and sales literature. To view the owner of a record, on the **Details** tab, see the **Owner** field.
- If you have complex local data groups with multiple levels of filters, this can slow synchronization. Review your local data groups and consider reducing the number of groups.

  More information: Save Outlook Contacts, Tasks, and E-mail Messages as Microsoft Dynamics CRM Records

After you have completed one or more of these suggestions, perform a synchronization. Note that the first synchronization performed after one of these steps will still be slow because records are being removed from the local data store. However, subsequent synchronization should be faster.

Related Topics

Using Microsoft Dynamics CRM for Outlook - Troubleshooting

Synchronize Data

Share or Assign Records

Synchronizing Information

General Issues with Microsoft Dynamics CRM for Outlook - Troubleshooting

Start Diagnostics Wizard

Microsoft Dynamics CRM Diagnostics detects and fixes many problems you may encounter with Microsoft Dynamics CRM for Outlook including issues with connectivity, setup, and corrupted data. In some cases, you can also choose to allow the wizard to repair the problem.

The wizard is installed on your computer at the same time you install Microsoft Dynamics CRM for Outlook.

1. On the **Start** menu, click **All Programs**, click **Microsoft Dynamics CRM**, and then click **Diagnostics**.
2. To start the wizard, click **Run Diagnostics**.

Note

If you are working with a support representative, you can enable tracking to assist the representative with diagnosing your problems.

- In the wizard, click **Support Mode**, run the wizard, and then on the **Advanced Troubleshooting** tab, click **Create File**. You can save the compressed file to your desktop, and then send it to your support representative.

Related Topic

Managing Users

Why doesn't the Navigation Pane scrollbar in the CRM Shortcuts folder display correctly?

The **CRM** shortcuts folder does not display correctly if too many custom entities are added to the Navigation Pane. Have your system customizer or administrator remove some of the custom entities from the **CRM** shortcuts folder.

Related Topic

Doing CRM Work in Outlook

Why is the error log reporting this error, "ConnectionListen (Shared-Memory (LPC)) : Error 5."?

This error occurs when Microsoft Dynamics CRM starts before the Microsoft Data Engine (MSDE) is completely started. These events appear in the event log, but can be safely ignored.

Related Topic

Doing CRM Work in Outlook

Why can't I open a record?

This could occur for several reasons, including:

- Microsoft Dynamics CRM for Outlook is a Web application. Records are displayed in pop-up windows. If you have a pop-up blocker installed, it may block Microsoft Dynamics CRM pages from displaying. Disable your pop-up blocker and try again.
- You may not have permissions to view the record. For more information, see your system administrator.
- The record may have been deleted and your local data may not be synchronized. Synchronize and try again.

- The record may be included in your local data. Review your local data groups in your personal options.

More information: Set Personal Options

Related Topic

Doing CRM Work in Outlook

Why don't all of my Microsoft Dynamics CRM contacts appear in the address book?

- Only those contacts with a complete and valid e-mail address appear in the Microsoft Dynamics CRM address book.
- The address book may not have been synchronized. The address book is synchronized automatically once every 24 hours, and does not synchronize when you go offline. To synchronize your address book, in Microsoft Dynamics CRM for Outlook, on the Microsoft Dynamics CRM toolbar, point to **Synchronize with Microsoft CRM**, and then click **Address Book**.

Related Topic

Doing CRM Work in Outlook

When I upgraded to Microsoft Dynamics CRM 4.0, why weren't the changes I made to Microsoft Dynamics CRM 3.0 saved?

This usually occurs if you were offline before you upgraded and made changes to Microsoft Dynamics CRM, and then a synchronization error occurred and you chose to go online anyway. This can also occur if you were offline when you upgraded Microsoft Dynamics CRM for Microsoft Office Outlook. If you have changes that were not synchronized to the Microsoft Dynamics CRM server and you want to upgrade, you can do one of the following:

- If you are using Microsoft Dynamics CRM 3.0 or an earlier version, you can go offline, go online to synchronize changes, and then upgrade. If there are synchronization errors, you may need to re-enter data manually after the upgrade is complete.
- To make changes after you upgrade, go offline, and then go back online to synchronize changes made while offline.
- Complete the upgrade, and then re-enter the data manually. You may need to verify that you are not creating duplicate records.
- For additional solutions, contact Microsoft Customer Service and Support.

Related Topic

Doing CRM Work in Outlook

When I upgrade to Microsoft Dynamics CRM 4.0 CRM for Outlook, why do I get this error, "Creating a rule that is incompatible with versions of Outlook earlier than Outlook 2000. Are you sure you want to create this rule?"

During the upgrade process, Microsoft Dynamics CRM creates rules for Outlook. This message can be safely ignored. Click **Yes** to continue.

Related Topics

Doing CRM Work in Outlook

When I upgrade from Microsoft Dynamics CRM 3.0 laptop client for Outlook to Microsoft Dynamics CRM 4.0 for Microsoft Office Outlook with Offline Access, why do I get this error, "There are Microsoft Dynamics CRM client for Outlook items that have not been uploaded to the Microsoft Dynamics CRM server. These items will be lost during upgrade."

Microsoft Dynamics CRM for Outlook does not support changes made while offline. If your server is still running Microsoft Dynamics CRM version 1.2 or 3.0, go online and synchronize your data. Then try upgrading again.

If your Microsoft Dynamics CRM server has been upgraded, you must upgrade to Microsoft Dynamics CRM for Outlook with Offline Access while offline. After upgrading, go online and synchronize your data.

Related Topics

Doing CRM Work in Outlook

Synchronizing Information

When I send an e-mail message to someone in my organization, why are two e-mail activities created?

Microsoft Dynamics CRM is designed to create multiple e-mail activities for e-mail messages sent to users inside your organization, one activity for the person creating the e-mail activity and one activity for every recipient. You can turn off this feature.

1. In the Navigation Pane, click **Settings**, click **Administration**, and then click **System Settings**.
2. On the **E-mail** tab, clear the **Track e-mails sent between CRM users as two activities** check box.
3. Click **OK**.

Related Topics

Doing CRM Work in Outlook

Synchronizing Information

Why can't I view my Microsoft Dynamics CRM calendars in Outlook?

- If you are offline, the Service calendar is not available in Microsoft Dynamics CRM for Microsoft Office Outlook.
- If you are in Microsoft Dynamics CRM for Microsoft Office Outlook, the Workplace calendar is not available, unless the Site Map has been customized.
- If you cannot view the Service calendar, you do not have the Read privilege for the Service record type. This might be because you have custom or edited security roles. The Read privilege for the Service record type is included in all the default security roles available in Microsoft Dynamics CRM.

  To make the calendar visible for users with a specific security role, click **Settings**, click **Security Roles**. Open the security role. On the **Service Management** tab, for the **Service** record type, add the **Read** privilege.

Related Topics

Configuring the Application - Troubleshooting

Controlling Data Access

Why does opening an e-mail attachment with a file name that contains extended or accented characters appear to corrupt those characters in the title of the file?

The file is not corrupted, but may appear this way when you open it in Microsoft Dynamics CRM. You can view the file without the corrupted characters by saving the attachment to your desktop and then opening it.

1. Open the record with the attachment.
2. On the **Notes** tab, in the Notes area, click the file name of the attachment you want.
3. If the **Note** dialog box opens, click **Save and Close** to close it.
4. In the **File Download** dialog box, click **Save**.
5. Select a location and then click **Save**.
6. Navigate to the location and open the file.

Related Topic

Doing CRM Work in Outlook

Why can't I go back online?

- This usually occurs if you do not have a network connection or the Microsoft Dynamics CRM server is unavailable. Wait a few minutes, and then attempt to go back online and get a connection. If this condition persists, contact your system administrator.
- While you were offline, your user record may have been deactivated or your privileges to synchronize or go offline may have been changed. Contact your system administrator.
- Some data cannot be synchronized, such as appointments with conflicts or corrupt files. Attempt to reconcile these errors and try again. You may need to discard these changes and re-enter them after you are back online.
- To identify and fix many problems with Microsoft Dynamics CRM for Outlook, run Microsoft Dynamics CRM Diagnostics.
    1. On the **Start** menu, click **All Programs**, click **Microsoft Dynamics CRM**, and then click **Diagnostics**.
    2. To start the wizard, click **Run Diagnostics**.

Generating Reports – Troubleshooting

Why isn't data in a report, even though I expect it to be there?

There are several possible reasons why data you expect to be on a report does not appear:

- **Security.** If you don't have permission in Microsoft Dynamics CRM to view a record, it will not appear in the report.
- **Data is not entered in Microsoft Dynamics CRM.** The person entering data may have left fields empty.
- **Data does not match the criteria for the report.** Many reports include a default filter that displays only active records, or you may have selected criteria that the record doesn't match.
- **You may be viewing a cached copy of the report.** By default, data in Microsoft Dynamics CRM reports is pulled from the database each time you run a report. However, your system administrator may have changed a report to run from the cache. If data you entered recently is not included in the report, you may have an older version of the report from the cache. To refresh the report, on the Report toolbar, click the **Refresh** button .
- **You may not have permission to read records in a sub-report.** If you do not have permission to read record types that are included in a sub-report, you will get an error message saying that the sub-report could not be displayed.
- **Your Microsoft Internet Explorer privacy settings may block required cookies.** For chart reports, if instead of seeing the chart, you see a red letter X, your privacy settings may be blocking a cookie that is required for the chart control. To fix this problem, in your browser, enable cookies for the server that is running Reporting Services.
- **If you are offline, your local data groups may not include all the data.** If you are using the report from the Microsoft Dynamics CRM for Outlook with Offline Access while you are offline, you must have a local data group that includes all the data that will be in the report. More information: Work with Data to Take Offline

Related Topics

Running Reports - Troubleshooting

Create and Work with Reports

Why do one or more reports display slowly or stop responding?

Most reports return results within a few seconds to a minute. Some reports might take longer if the report includes a large number of records, or if the system usage is high.

If you are a user:

- Edit the filter before you run the report to select fewer records.
- If you need to run a summary report for a large number of records, such as the Account Distribution report, expect it to take a while to run and try to run it when system usage is low.

If you are a system administrator:

- Change the default filter on the report to be more restrictive.
- Remove the report from on-demand use and schedule it to run when the system is less heavily used.
- If the report is a custom report, for suggestions on improving performance, see Writing Reporting Services Reports (Microsoft Dynamics CRM SDK).
- If the problem occurs on a matrix table report, such as the Case Summary Table report, use Task Manager to see if the Web service process (w3wp.exe) on the report server is consuming all memory. If this is the problem, you can modify the MemoryLimit setting in Reporting Services. Reports are automatically stopped if they exceed the percentage of memory specified in this setting. By lowering this limit, you can cause the report to fail without consuming so much memory that the server is unusable. For more information, see the topic "RSReportServer Configuration File" in Reporting Services Books Online.
- Identify whether you need to upgrade hardware or use a separate server for Reporting Services. For more information, see Chapter 1-4, "Planning Deployment," and chapter 2-2, "Microsoft Dynamics CRM 4.0 Server Installation Instructions in the and the article *Microsoft Dynamics CRM 4.0 Implementation Guide*, and the article "Improving Performance of Microsoft Dynamics CRM by Using a Dedicated Report Server".

Related Topics

Running Reports - Troubleshooting

Create and Work with Reports

Customizing and Organizing Reports

Why do I receive the error "An error has occurred during report processing. Cannot create connection to data source CRM. Login failed for user 'NT AUTHORITY\ANONYMOUS LOGON'" when I run any report?

This error will occur if the **Enable Integrated Windows Authentication** check box is not selected in Microsoft Internet Explorer.

To fix this problem:

1. On the Internet Explorer **Tools** menu, click **Internet Options**.
2. On the **Advanced** tab, in the **Security** section, select **Enable Integrated Windows Authentication**, and then click **OK**.
3. Restart your computer.

Related Topics

Running Reports - Troubleshooting

Create and Work with Reports

Running Reports and Analyzing Data

Why do I receive the error "The maximum number of tables in a query (260) was exceeded" when I try to run a Reporting Services report?

If you are a user, this problem may occur if you use too many related record types to filter the report. Try reducing the number of filter criteria for the report, and running the report again. If you are running the report from a view that uses several record types in the view criteria, try running it from a simpler view instead.

If you are writing a new Reporting Services report, you may get this error if you have too many joins in the SELECT statement in your report. Try reducing the number of joins.

Related Topics

Running Reports - Troubleshooting

Create and Work with Reports

Customizing and Organizing Reports

Printing and Exporting Reports – Troubleshooting

When I try to print a Reporting Services report, why do I receive the error "Object doesn't support this property or method"?

This error occurs the first time you try to print a report from either Microsoft Dynamics CRM or Microsoft Dynamics CRM for Outlook if you are not in the local Administrator group on your computer. You need a Microsoft ActiveX control that is required for printing reports, but do not have permission to install ActiveX controls on your computer.

To fix this problem:

- Ask a system administrator or person in the local Administrator group on your computer to log on to your computer and follow these instructions:
  a. Use Microsoft Internet Explorer to go to **http://***<CRM_Server>*.
  b. In the Navigation Pane, click **Workplace**, and then under **My Work**, click **Reports**.
  c. Select a report, run the report, and then click **Print**.
  The ActiveX control required for printing will be installed on your computer.

Related Topics

Running Reports - Troubleshooting

Create and Work with Reports

Running Reports and Analyzing Data

Why do I receive the error "Error loading resource string" when I try to print a Reporting Services report?

This error might occur if the Microsoft ActiveX control used for printing reports is an old version or is not installed correctly. To fix this problem:

1. In Microsoft Internet Explorer, on the **Tools** menu, click **Internet Options**.

2. In Microsoft Internet Explorer version 6, on the **General** tab, in the **Temporary Internet files** section, click **Settings**.
   In Microsoft Internet Explorer version 7, on the **General** tab, in the **Browsing history** section, click **Settings**.
3. Click **View objects**.
4. Select **RSClientPrint Class**, and then on the **Edit** menu, click **Delete**.
5. Try printing the report again.

Related Topics

Running Reports - Troubleshooting

Create and Work with Reports

Running Reports and Analyzing Data

Managing Reports – Troubleshooting

Why do one or more reports display slowly or stop responding?

Most reports return results within a few seconds to a minute. Some reports might take longer if the report includes a large number of records, or if the system usage is high.

If you are a user:

- Edit the filter before you run the report to select fewer records.
- If you need to run a summary report for a large number of records, such as the Account Distribution report, expect it to take a while to run and try to run it when system usage is low.

If you are a system administrator:

- Change the default filter on the report to be more restrictive.
- Remove the report from on-demand use and schedule it to run when the system is less heavily used.
- If the report is a custom report, for suggestions on improving performance, see Writing Reporting Services Reports (Microsoft Dynamics CRM SDK).
- If the problem occurs on a matrix table report, such as the Case Summary Table report, use Task Manager to see if the Web service process (w3wp.exe) on the report server is consuming all memory. If this is the problem, you can modify the MemoryLimit setting in Reporting Services. Reports are automatically stopped if they exceed the percentage of memory specified in this setting. By lowering this limit, you can cause the report to fail without consuming so much memory that the server is unusable. For more information, see the topic "RSReportServer Configuration File" in Reporting Services Books Online.
- Identify whether you need to upgrade hardware or use a separate server for Reporting Services. For more information, see Chapter 1-4, "Planning Deployment," and chapter 2-2, "Microsoft Dynamics CRM 4.0 Server Installation Instructions in the and the article *Microsoft Dynamics CRM 4.0 Implementation Guide*, and the article "Improving Performance of Microsoft Dynamics CRM by Using a Dedicated Report Server".

Related Topics

Running Reports - Troubleshooting

Create and Work with Reports

Customizing and Organizing Reports

Why do I receive the error "SRS soap exception: The permissions granted to user 'DOMAIN\User' are insufficient for performing this operation" when I try to download a report?

To download a report from Microsoft Dynamics CRM, you must have:

- The Report Manager System Administrator security role. By default, users in the local Administrators group on the report server have this security role.
- The Microsoft Dynamics CRM System Administrator or System Customizer security roles, or the Manage Reports privilege.

To download a report, log in as a user with the necessary security roles. For more information about security roles in Reporting Services, see *Reporting Services Books Online*.

Related Topics

Running Reports - Troubleshooting

Accessing Parts of the Application - Troubleshooting

Create and Work with Reports

Controlling Data Access

Customizing and Organizing Reports

Why do I receive the error "The permissions granted to user 'NT AUTHORITY\NETWORK SERVICE' are insufficient for performing this operation" when I try to modify report properties, or upload or download a report?

This error occurs if Microsoft Dynamics CRM and Reporting Services are installed on the same server, the server is running Windows Server 2003 or is a Microsoft Windows Small Business Server 2003, and **Domain user** was specified on the **Specify Security Account** page when Microsoft Dynamics CRM was installed.

To add the necessary permissions, make the following change in Reporting Services Report Manager.

1. On the server running Microsoft Dynamics CRM, use Microsoft Internet Explorer to open Reporting Services Report Manager. By default, Report Manager is located at http://localhost/Reports. If you renamed the virtual directory for Report Manager when you installed Reporting Services, use the virtual directory name you used rather than Reports.
2. Click **Show Details**.
3. Click the icon in the **Edit** column next to the folder for your organization.
4. Click **Security**.
5. Click **New Role Assignment**.
6. On the **New Role Assignment** page, in the **Group or user name** box, enter the value of the service account name for **ASP.NET**:
    - For English locales, enter **NT Authority\Network Service**.
    - For other locales, open the setup log file with Notepad. By default, this file is located at <systemdrive>:\Documents and Settings\User\Application Data\Microsoft\MSCRM\Logs\crm30svrsetup.log
        a. Search for **ServerInstallInfo.AspNetServiceAccountName**.

b. Look at the value in this line, and enter this value in the **Group or user name** box.

7. Select the check box next to **Publisher for Microsoft CRM**.
8. Click **OK**.

Related Topics

Running Reports - Troubleshooting

Create and Work with Reports

Customizing and Organizing Reports

Frequently Asked Questions

How can I make a suggestion for the next version of Microsoft Dynamics CRM?

You can add suggestions for product features or vote for the suggestions of other people on the Microsoft Dynamics CRM Web site. When we consider product enhancements, supported ideas rank higher in the rating system that we use.

Please visit the suggestion page and either add your suggestion, or if it's already there, vote for your suggestion to be sure our product planning team has this information to consider for future releases. More information: Resource Center

How do I change my Microsoft Dynamics CRM password?

Your permissions are determined by your network account and password. Microsoft Dynamics CRM doesn't have a separate password from your network password.

Glossary

A

accept (To move a case into a queue with the intention of working on it.)

access level (A security role setting that determines, for a given entity, who can access records. There are four options: just the owner of the record, all users in the current business unit, all users in the current or child business unit, or all users.)
See also: privilege (A user's right to perform a specific action on a specific record type or to perform a task. Privileges are assigned by system administrators to security roles. Users are then assigned security roles. Examples of privileges include Update Account and Publish Customizations.), security role (A defined set of privileges. The security role assigned to a user determines which tasks the user can perform and which parts of the user interface the user can view. All users must be assigned at least one security role in order to access the system.)

account (A company that might do business with your organization.)
See also: contact (A person who represents a customer or potential customer, or an individual related to an account. For example, an individual who purchases products or services for their own use, or an employee of an account. A contact may also be a person involved in a business transaction, such as a supplier or a colleague.), lead (A potential customer who must be qualified or disqualified as a sales opportunity. If a lead is qualified, it can be converted to an opportunity, account, and/or contact.), opportunity (A potential revenue-generating event or sale to an account that needs to be tracked through a sales process to completion.)

activate (To make a previously unavailable record available for use.)

activity (An action to be performed, such as a task, or a communication item that is sent or received, for example, e-mail, phone calls, and appointments. The status of activities is tracked and the activity history is stored in the system, so users can view the open and closed activities.)
See also: queue (A holding container for activities that need to be completed. There are queues that contain cases and activities in the Workplace, and queues of articles in the knowledge base.)

address book (A collection of names and e-mail addresses. The Microsoft Dynamics CRM address book is part of the collection of address books in the Microsoft Office Outlook Address Book, which can be used to address e-mail messages.)

Advanced Find (A tool used to search for specific records and activities.)
See also: Index (The dynamic alphabet bar located on the bottom of the lists in the Microsoft Dynamics CRM application window. When a letter or the number sign (#) is clicked, the list displays the available records by that letter.)

Advanced Find View (The view used to display results of searches created with Advanced Find.)

allotment type (A unit of service, such as a case or a range of coverage dates, specified in a service contract that indicates how much access a customer has to customer service.)
See also: case (A customer service issue or problem reported by a customer and the activities that customer service representatives use to resolve it.), contract (An agreement to provide support during specified coverage dates or for a specified number of cases or length of time. When customers contact customer service, the level of support they receive is determined by their contract.)

appointment (An activity represented by a time interval that has a start time, an end time, and a duration. An appointment does not include a service or check for conflicts, and you cannot search for available times.)
See also: service activity (A schedulable appointment to provide a service to a customer. A service activity uses one or

more resources to perform a service at a specific time and place.)

article (A text-based piece of content in the knowledge base.)
See also: knowledge base (A feature in Microsoft Dynamics CRM that provides a process for drafting, submitting, reviewing, and publishing articles about an organization's products and services. Users with manager-level security roles can approve, reject, add comments to, and unpublish articles that are submitted for review.), template (A framework for an e-mail message, contract, or article. Templates are used to ensure consistent layouts and content in similar types of documents.)

assign (To specify the owner of a record, such as an account or case, or an activity, such as an e-mail message or phone call. Users can assign cases and activities to either a user or a queue.)
See also: queue (A holding container for activities that need to be completed. There are queues that contain cases and activities in the Workplace, and queues of articles in the knowledge base.), share (To allow another user or team to have a specified amount of access to a record, such as a case, account, or contract. For example, you can share an account with a team and specify that its members can read the account record, but cannot have write access to it.)

associated record (A record that is referenced in the current record. For example, an account might have many associated contact records.)

associated view (The view of an entity that is displayed in the forms of other entities. The associated view is different from the views that are visible for the entity in its own area of the user interface. For example, in an account record, under **Details**, you can click **Contacts** to view and open a contact form. That is the Contacts associated view. There can be only one associated view of each entity.)
See also: Index (The dynamic alphabet bar located on the bottom of the lists in the Microsoft Dynamics CRM application window. When a letter or the number sign (#) is clicked, the list displays the available records by that letter.), record (An entry in the Microsoft Dynamics CRM database that stores all the information about a specific item, such as a contact. Records are like individual index cards in an index-card filing system. You can view basic information about records in a list, and you can view or change detailed information about records in a form.), record type (A group of records. For example, all account records are grouped as the Account record type. Also called an entity.), view (A filter applied to a list of records. Users can choose different views that contain all the records or activities of a particular type or that are a subset of that type.)

attribute (A property of an entity with a specific data type. Attributes are analogous to columns in a database table. When attributes are added to an entity form, they are displayed as fields that correspond to their data type.)

automatic mapping (Importing a data file where the column headings exactly match the Microsoft Dynamics CRM display names.)

automatic workflow (A type of workflow that runs as soon as the conditions defined in the workflow logic are met. No user action is required to start the workflow.)
See also: on-demand workflow (A type of workflow that only runs when a user chooses to apply it to records from a toolbar or menu in Microsoft Dynamics CRM.)

auto-response (An e-mail feature that sends a standard response whenever an e-mail message is received.)

availability (The periods of time when a resource can be scheduled to participate in a service activity.)
See also: capacity (A measurement of the amount of work or skill level a resource can provide in relationship to the amount of effort required to perform a service. Every time a resource performs a service, its capacity is reduced by the amount of effort required.)

B

base currency (The primary or default currency in which your organization conducts business. Any transactions in other currencies are automatically converted to the base currency in the Microsoft Dynamics CRM database, using the exchange rate defined in the record for that currency.)

base language (The default language for your organization's implementation of Microsoft Dynamics CRM.)

base unit (The initial measurement of a product. A unit group contains the lowest unit of measurement in which a product is available, such as a liter. It then lists all the different increments that this base unit is packaged in for sale, and indicates which one is the primary unit.)
See also: primary unit (The measurement used to define the most commonly sold unit of a product.), unit (A measurement that specifies in what quantity a product will be sold.), unit group (A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter bottle. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.)

billing frequency (A pre-defined period of time that specifies how often a customer should be billed. Common billing frequencies are monthly, quarterly, and annually.)
See also: allotment type (A unit of service, such as a case or a range of coverage dates, specified in a service contract that indicates how much access a customer has to customer service.), contract line (A line item in a contract that describes the service support to be provided. A contract line often includes pricing information and how support will be allotted.), service coverage (The specific hours and days of the week for which service support will be provided. This is defined in the contract template, but is not enforced by the system.)

business closure (A period of time that the entire business is closed and service activities cannot be made.)

Business Recommended (A requirement level used for fields that should be filled in, but don't have to be, in order to save the record. Fields with this requirement level appear in the Quick Create form. Recommended fields are marked with plus symbols.)

Business Required (A requirement level used for fields that must be filled in before a record can be saved. Fields with this requirement level appear in the Quick Create form. Required fields are marked with an asterisk.)

business unit (A way of representing a division or department in a company. Business units are arranged in a hierarchy, and all users are assigned to one business unit.)
See also: child business unit (A business unit that is immediately under another business unit in the business hierarchy of an organization.), division (An organizational level of a company. Divisions can be based on geography, (East Division, West Division); product specializations, (New Technologies Division); or any other characteristics. In Microsoft Dynamics CRM, a division can be represented by a business unit.), organization (The top level of the business hierarchy. The organization is divided into business units. There can be only one organization per deployment.)

C

campaign (A marketing program that uses many communication vehicles to accomplish a specific result. For example, using advertisements and direct mail to increase market share, introduce new products, or retain customers.)

campaign activity (An activity associated with a specific campaign, such as a letter, fax, or phone call. Campaign activities include campaign-specific information, and must be distributed to create the individual activities for users to perform.)

campaign response (A record of the communication you receive from a potential customer in response to a specific campaign.)

campaign template (A framework for a marketing program that uses many communication vehicles to accomplish a

specific result. For example, using advertisements and direct mail to increase market share, introduce new products, or retain customers.)

capacity (A measurement of the amount of work or skill level a resource can provide in relationship to the amount of effort required to perform a service. Every time a resource performs a service, its capacity is reduced by the amount of effort required.)
See also: availability (The periods of time when a resource can be scheduled to participate in a service activity.)

case (A customer service issue or problem reported by a customer and the activities that customer service representatives use to resolve it.)

channel (The type of activity in a marketing campaign, such as e-mail or phone call.)

check condition (An element of workflow logic that defines a specific situation and any actions that should be taken if that situation occurs. A logical "if-then" statement in a workflow.)

child business unit (A business unit that is immediately under another business unit in the business hierarchy of an organization.)
See also: business unit (A way of representing a division or department in a company. Business units are arranged in a hierarchy, and all users are assigned to one business unit.), organization (The top level of the business hierarchy. The organization is divided into business units. There can be only one organization per deployment.),

child record (A record in a hierarchical relationship with a parent record where a reference to the parent record is stored in the record. One parent record can be related to many child records. Child records have lookup fields in the form to allow them to be related to a parent record.)
See also: parent record (A record that is in a hierarchical relationship with a child record, where a reference to the record is stored in the child record. One parent record can be related to many child records.)

child workflow (A type of workflow that runs only when started by another workflow. It is contained within a parent workflow and cannot be run on its own.)

close (To set the status of a record to Closed. This hides it in lists of open records and sets some types of records to read-only. Several types of records are closed automatically when you qualify or disqualify them.)

column headings (Text used in the first row of a spreadsheet or file that labels the data in each column.)

comma-separated value (CSV) file (A data file with a.csv file extension. Typically a CSV file consists of fields and records, stored as text, in which the fields are separated from one other by commas.)
See also: delimited text (A file that contains data in which individual field values are separated by commas, tabs, semicolons, or other characters. Delimited text file names typically end with a.txt file extension (for example, "my_file.txt").)

competitor (A company or organization that might compete for sales opportunities with your business unit. Competitor records can be linked to opportunity, product, and sales literature records so that they are available when you are competing for a sale.)
See also: opportunity (A potential revenue-generating event or sale to an account that needs to be tracked through a sales process to completion.), product (An item in the product catalog. Products can be linked to other records, such as quotes, campaigns, and cases.), sales literature (The documents that are created with specific information about products or services and given to customers to help increase sales.)

condition (An element of workflow logic that defines a specific situation and any actions that should be taken when that situation occurs. A logical "if-then" statement in a workflow.)

conditional branch (An element of workflow logic that defines an alternative condition and action or additional steps, in cases when the criteria in a condition element are not met. A logical "else-if-then" statement in a workflow.)

configurable cascade (A relationship between parent and child entities in which any action taken on a parent entity record can also be applied to any child entity records that are related to the parent entity record. You can define the behavior for each type of action. For example, you can set it up so that if you share a record in the parent entity, any related records for the child entity are not automatically shared. But if you delete a parent entity record, any related child entity records are automatically deleted.)
See also: parental (A relationship between entities in which any action taken on a record of the parent entity is also taken on any child entity records that are related to the parent entity record. For example, if you delete a record in the parent entity, the related child entity records are also deleted; or if you share a parent entity record, the related records from the child entity are also shared.), referential (A relationship between two entities in which you can navigate to any related records, but actions taken on one will not affect the other.), referential, restrict delete (A relationship between two entities in which you can navigate to any related records. Actions taken on the parent record will not be applied to the child record, but the parent record cannot be deleted while the child record exists. However, you cannot delete a record when related records exist.)

contact (A person who represents a customer or potential customer, or an individual related to an account. For example, an individual who purchases products or services for their own use, or an employee of an account. A contact may also be a person involved in a business transaction, such as a supplier or a colleague.)
See also: account (A company that might do business with your organization.), lead (A potential customer who must be qualified or disqualified as a sales opportunity. If a lead is qualified, it can be converted to an opportunity, account, and/or contact.), opportunity (A potential revenue-generating event or sale to an account that needs to be tracked through a sales process to completion.)

contract (An agreement to provide support during specified coverage dates or for a specified number of cases or length of time. When customers contact customer service, the level of support they receive is determined by their contract.)
See also: allotment type (A unit of service, such as a case or a range of coverage dates, specified in a service contract that indicates how much access a customer has to customer service.), case (A customer service issue or problem reported by a customer and the activities that customer service representatives use to resolve it.)

contract line (A line item in a contract that describes the service support to be provided. A contract line often includes pricing information and how support will be allotted.)

convert (The process of changing or recategorizing a record from one record type to another. For example, converting a campaign response to a lead, and then converting the lead to an account, contact, or opportunity.)

custom attribute (An attribute that is not included in Microsoft Dynamics CRM by default. Instead, a customer or partner adds it after they install the software, to help adapt the software to the customer's needs.)
See also: system attribute (An attribute that is included in Microsoft Dynamics CRM by default. For example, the **name** attribute in the Account entity is a system attribute.)

custom entity (An entity that is not included in Microsoft Dynamics CRM by default. You can create custom entities by using the customization tools.)
See also: entity (A structure used to manage data. Microsoft Dynamics CRM entities include Account, Case, and Activity.), related entity (An entity that is associated with a primary entity (record type) through a unique reference defined by using a lookup control on the related entity form. For example, an account has a unique reference to a primary contact.), system entity (An entity that is included in Microsoft Dynamics CRM by default, such as Account.)

custom workflow action (An element of workflow logic that specifies a custom operation that should be performed by workflow jobs when conditions defined in the workflow have been met. Custom workflow actions can be developed by using the information in the *Microsoft Dynamics CRM 4.0 Software Development Kit*, and are not available in Microsoft Dynamics CRM by default.)

custom step (An element of workflow logic that provides extensions to the logical elements available by default in Microsoft Dynamics CRM. Steps can include conditions, actions, other steps, or a combination of these elements. Custom workflow steps can be developed by using the information in the *Microsoft Dynamics CRM 4.0 Software Development Kit*.)

customer (The account or contact with which a business unit conducts a business transaction.)
See also: account (A company that might do business with your organization.), contact (A person who represents a customer or potential customer, or an individual related to an account. For example, an individual who purchases products or services for their own use, or an employee of an account. A contact may also be a person involved in a business transaction, such as a supplier or a colleague.)

D

data delimiter (The character used to surround data that includes the field delimiter. For example, if the field delimiter is a comma, and the data delimiter is quotation marks, one column in a file could contain "Redmond, WA" and still be treated as a single column.)

data field (A placeholder that inserts text into an e-mail message or document automatically. The data field represents a category of information that corresponds to one column of information in a data source. The name of each data field is listed in the first row (column heading) of the data source. "PostalCode" and "LastName" are examples of data field names. Placeholders that insert text into an e-mail message or document automatically.)
See also: dynamic values (A placeholder that inserts text into a Microsoft Dynamics CRM record automatically. You can set dynamic values for the entities or records in a workflow only by using the **Form Assistant** pane.)

data map (A file that contains information about how data from a source system corresponds to data in Microsoft Dynamics CRM.)

data migration (The process of loading data from another customer relationship management system into Microsoft Dynamics CRM.)

deactivate (To make a record unavailable for updating (read-only) while maintaining the data. This is usually preferable to deleting a record, which removes all data.)

default filter (Criteria used to limit data in Microsoft SQL Server Reporting Services reports. Typically, the default filter restricts data to active records that have been modified within a certain time period.)

delimited text (A file that contains data in which individual field values are separated by commas, tabs, semicolons, or other characters. Delimited text file names typically end with a.txt file extension (for example, "my_file.txt").)
See also: comma-separated value (CSV) file (A data file with a.csv file extension. Typically a CSV file consists of fields and records, stored as text, in which the fields are separated from one other by commas.)

department (An organizational level of a company. For example, marketing department, accounting department, and research and development department. In Microsoft Dynamics CRM, a department can be represented by a business unit.)
See also: business unit (A way of representing a division or department in a company. Business units are arranged in a hierarchy, and all users are assigned to one business unit.), division (An organizational level of a company. Divisions can be based on geography, (East Division, West Division); product specializations, (New Technologies Division); or any other characteristics. In Microsoft Dynamics CRM, a division can be represented by a business unit.), organization (The top level of the business hierarchy. The organization is divided into business units. There can be only one organization per deployment.)

direct e-mail (The distribution of marketing materials in e-mail over an intranet or the Internet, usually to a large

number of recipients. The e-mail goes to each recipient individually, giving the appearance of the communication being sent personally.)

discount (A reduction in the selling price of products or services. Discounts are usually offered by the seller when the buyer agrees to meet specific conditions.)

discount list (A group of price reductions that can be applied to a product, based on volume purchased. Discount lists can be added to price list items in a product.)
See also: price list (A group of the specific prices that can be charged for each unit in the unit group of a product. Price lists are used to determine the pricing in a quote for a customer. A default price list can be added to a product.), product (An item in the product catalog. Products can be linked to other records, such as quotes, campaigns, and cases.), unit group (A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter bottle. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.)

disqualify (To verify that a record does not fit specific criteria and should not be converted to an opportunity, account, or contact, or be added to a marketing list.)

distribute (To create campaign activities for each account, contact, or lead in a marketing list associated with a campaign, and then to assign the activities to the specified owners, or to perform the activities automatically (such as sending e-mail messages).)

division (An organizational level of a company. Divisions can be based on geography, (East Division, West Division); product specializations, (New Technologies Division); or any other characteristics. In Microsoft Dynamics CRM, a division can be represented by a business unit.)
See also: business unit (A way of representing a division or department in a company. Business units are arranged in a hierarchy, and all users are assigned to one business unit.), organization (The top level of the business hierarchy. The organization is divided into business units. There can be only one organization per deployment.)

draft contract (A contract that has not been activated or invoiced.)

duplicate detection (Process of automatically identifying potential duplicate records.)

dynamic values (A placeholder that inserts text into a Microsoft Dynamics CRM record automatically. You can set dynamic values for the entities or records in a workflow only by using the **Form Assistant** pane.)

E

entitlement (The service support that is available to a customer, as written in a contract. For example, the type of support and the total number of minutes with a customer service representative.)
See also: case (A customer service issue or problem reported by a customer and the activities that customer service representatives use to resolve it.), contract (An agreement to provide support during specified coverage dates or for a specified number of cases or length of time. When customers contact customer service, the level of support they receive is determined by their contract.)

entity (A structure used to manage data. Microsoft Dynamics CRM entities include Account, Case, and Activity.)
See also: record type (A group of records. For example, all account records are grouped as the Account record type. Also called an entity.)

equipment (The tools or assets used to perform a service activity.)
See also: facility (A physical space, such as a conference room or service bay, where a service activity can be performed.), resource (A user that performs a service, or the equipment or facility that is required for a service.),

service (A type of work performed for a customer by one or more resources. Services are schedulable activities.)

Express mode (A mode of the Data Migration Wizard used when you already have a data map and do not need to review the mappings in the map. In this mode, you map only files, columns, and users that are not included in the data map.)

F

facility (A physical space, such as a conference room or service bay, where a service activity can be performed.)
See also: equipment (The tools or assets used to perform a service activity.), resource (A user that performs a service, or the equipment or facility that is required for a service.), service (A type of work performed for a customer by one or more resources. Services are schedulable activities.)

field delimiter (Character used to separate columns of data in a file.)

filtered view (A view of data in the Microsoft Dynamics CRM database used for reports and exported dynamic Microsoft Office Excel files. When users view a report or file that uses a filtered view, they can see only the data that they have permission to view.)

fiscal year (A span of time during which the financial activities of an organization are calculated. A fiscal year is divided into fiscal periods, typically defined as semesters, quarters, or months. The organization determines the dates that begin and end its fiscal year, which may not correspond to a traditional calendar year.)
See also: sales quota (A revenue objective specified as a monetary amount that has been assigned to a salesperson for a specified fiscal period.)

form (A page that displays detailed information that users have entered into Microsoft Dynamics CRM about a specific record, such as all information about a contact. Information that users enter in a form is stored in Microsoft Dynamics CRM as a record.)
See also: list (The summary view for a group of records, such as accounts or contacts, or the result of an Advanced Find query. You can view detailed information about a record by opening the form for the record.), record (An entry in the Microsoft Dynamics CRM database that stores all the information about a specific item, such as a contact. Records are like individual index cards in an index-card filing system. You can view basic information about records in a list, and you can view or change detailed information about records in a form.)

Form Assistant pane (A search pane that displays a list of filtered records. The records displayed are determined by which field that you are in and what data that you enter. In some areas of Microsoft Dynamics CRM, you can also create a follow-up activity from the Form Assistant pane pane. Using the Form Assistant pane is an alternative to using the **Look Up Records** dialog box.)

G

globally unique identifier (GUID) (A unique 128-bit value that is used to identify a record.)

H

I

IFRAME (A windowless inline floating frame that is typically used for including Web pages in a form. Examples of Web pages that can be included are a page from a Microsoft SharePoint site, a section of HTML such as a button, or a custom application.)

import (Process for uploading data from a comma-separated value (CSV) file to Microsoft Dynamics CRM by using the Import Data Wizard.)

Import Data Wizard (A wizard used to import multiple records from a comma-delimited text file into Microsoft Dynamics CRM as records.)

Index (The dynamic alphabet bar located on the bottom of the lists in the Microsoft Dynamics CRM application window. When a letter or the number sign (#) is clicked, the list displays the available records by that letter.)
See also: Advanced Find (A tool used to search for specific records and activities.), view (A filter applied to a list of records. Users can choose different views that contain all the records or activities of a particular type or that are a subset of that type.)

invoice (An order that has been billed. An invoice is also a record of a sale to a customer, including details about the products or services purchased.)
See also: order (A confirmed request for delivery of goods or services based on specified terms. An order is a quote that has been accepted by a customer.), quote (A formal offer for products or services, proposed at specific prices and related payment terms, which is sent to an opportunity, account, or contact.)

ISV.Config (An XML configuration document used to update the navigation structure of Microsoft Dynamics CRM, including adding custom buttons, tabs, and menus to entity forms.)

J

K
kit (A group of finished items that compose a set. In Microsoft Dynamics CRM, a kit is comprised of a set of products in the product catalog.)

kit product (Any product in the product catalog that is part of a kit.)

knowledge base (A feature in Microsoft Dynamics CRM that provides a process for drafting, submitting, reviewing, and publishing articles about an organization's products and services. Users with manager-level security roles can approve, reject, add comments to, and unpublish articles that are submitted for review.)
See also: article (A text-based piece of content in the knowledge base.), template (A framework for an e-mail message, contract, or article. Templates are used to ensure consistent layouts and content in similar types of documents.)

L
lead (A potential customer who must be qualified or disqualified as a sales opportunity. If a lead is qualified, it can be converted to an opportunity, account, and/or contact.)
See also: account (A company that might do business with your organization.), contact (A person who represents a customer or potential customer, or an individual related to an account. For example, an individual who purchases products or services for their own use, or an employee of an account. A contact may also be a person involved in a business transaction, such as a supplier or a colleague.), opportunity (A potential revenue-generating event or sale to an account that needs to be tracked through a sales process to completion.)

list (The summary view for a group of records, such as accounts or contacts, or the result of an Advanced Find query. You can view detailed information about a record by opening the form for the record.)
See also: form (A page that displays detailed information that users have entered into Microsoft Dynamics CRM about a specific record, such as all information about a contact. Information that users enter in a form is stored in Microsoft Dynamics CRM as a record.), record (An entry in the Microsoft Dynamics CRM database that stores all the information about a specific item, such as a contact. Records are like individual index cards in an index-card filing system. You can view basic information about records in a list, and you can view or change detailed information about records in a form.)

list view (See "view".)

local data (Data that is available offline and stored on the local computer.)

local data group (A filter that determines what data is available offline and stored on the local computer.)

locale (A combination of language and geographic location used to format the display of the date, time, currency, and various measurements.)

logical operator (An element of logic that affects the outcome of a logical expression. Examples of logical operators include **Equals** and **Contains**. In Microsoft Dynamics CRM, logical operators are used in Advanced Find queries, as well as in workflow conditions and dynamic values.)
See also: query relational operator (Part of an expression (for example "is equal to" or "contains") that defines how a specified attribute should be compared with a value.)

M

manual discount (The amount subtracted from the set price of a product or service.)
See also: discount list (A group of price reductions that can be applied to a product, based on volume purchased. Discount lists can be added to price list items in a product.), volume discount (The amount subtracted from the unit of a product or service based on the volume purchased.)

map (To identify where specific data in a source file should be imported or migrated into Microsoft Dynamics CRM.)

marketing list (A list of accounts, contacts, or leads that matches a specific set of criteria.)

marketing list members (Accounts, contacts, or leads that are included in a marketing list.)

master record (The record that stays active when records are merged. Data from the subordinate record is added to this record.)
See also: subordinate record (The record that is deactivated when records are merged. Data from the subordinate record is added to the master record.)

matchcode (A code that is created for every record that a duplicate-detection rule might apply to, used as part of the process of detecting duplicates.)

N

Navigation Pane (The column on the left side of Microsoft Dynamics CRM that includes panes, such as **Workplace** and **Marketing**, and the categories within each pane. Click a category under the pane to show the items in the list.)
See also: Form Assistant pane (A search pane that displays a list of filtered records. The records displayed are determined by which field that you are in and what data that you enter. In some areas of Microsoft Dynamics CRM, you can also create a follow-up activity from the Form Assistant pane pane. Using the Form Assistant pane is an alternative to using the **Look Up Records** dialog box.), Site Map (An XML representation of the structure of the Navigation Pane in Microsoft Dynamics CRM, including the areas, groups, and subareas where entities are displayed, and the privileges associated with each subarea.)

O

on-demand workflow (A type of workflow that only runs when a user chooses to apply it to records from a toolbar or menu in Microsoft Dynamics CRM.)
See also: automatic workflow (A type of workflow that runs as soon as the conditions defined in the workflow logic are met. No user action is required to start the workflow.)

opportunity (A potential revenue-generating event or sale to an account that needs to be tracked through a sales process to completion.)
See also: account (A company that might do business with your organization.), contact (A person who represents a customer or potential customer, or an individual related to an account. For example, an individual who purchases products or services for their own use, or an employee of an account. A contact may also be a person involved in a business transaction, such as a supplier or a colleague.), lead (A potential customer who must be qualified or disqualified as a sales opportunity. If a lead is qualified, it can be converted to an opportunity, account, and/or contact.)

opportunity relationship (A type of relationship role that describes the relationship between an account or contact and an opportunity.)

order (A confirmed request for delivery of goods or services based on specified terms. An order is a quote that has been accepted by a customer.)
See also: invoice (An order that has been billed. An invoice is also a record of a sale to a customer, including details about the products or services purchased.), quote (A formal offer for products or services, proposed at specific prices and related payment terms, which is sent to an opportunity, account, or contact.)

organization (The top level of the business hierarchy. The organization is divided into business units. There can be only one organization per deployment.)
See also: business unit (A way of representing a division or department in a company. Business units are arranged in a hierarchy, and all users are assigned to one business unit.), division (An organizational level of a company. Divisions can be based on geography, (East Division, West Division); product specializations, (New Technologies Division); or any other characteristics. In Microsoft Dynamics CRM, a division can be represented by a business unit.)

originating lead (The source of the lead that led to an account or opportunity.)
See also: lead (A potential customer who must be qualified or disqualified as a sales opportunity. If a lead is qualified, it can be converted to an opportunity, account, and/or contact.)

P
parent account (An account record associated with one or more other account records.)

parent business unit (A business unit that is immediately above another business unit in the business hierarchy of an organization.)

parent record (A record that is in a hierarchical relationship with a child record, where a reference to the record is stored in the child record. One parent record can be related to many child records.)

parental (A relationship between entities in which any action taken on a record of the parent entity is also taken on any child entity records that are related to the parent entity record. For example, if you delete a record in the parent entity, the related child entity records are also deleted; or if you share a parent entity record, the related records from the child entity are also shared.)

parallel wait branch (An element of workflow logic that defines an alternative wait condition with a corresponding set of additional steps that are performed only when the initial criterion is met. You can use parallel wait branches to create timeouts in your workflow logic. They help prevent the workflow from waiting indefinitely until the criteria defined in a wait condition have been met.)

POP3 (A common protocol that is used to retrieve e-mail messages from an Internet e-mail server.)

price list (A group of the specific prices that can be charged for each unit in the unit group of a product. Price lists are

used to determine the pricing in a quote for a customer. A default price list can be added to a product.)
See also: discount list (A group of price reductions that can be applied to a product, based on volume purchased. Discount lists can be added to price list items in a product.), product (An item in the product catalog. Products can be linked to other records, such as quotes, campaigns, and cases.), unit group (A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter bottle. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.)

Prices Locked (A type of pricing behavior that prevents changes to the price per unit for products in open orders or invoices. Even if a price changes in the product catalog, the original price will remain for any open orders or invoices in which Prices Locked has been enabled.)
See also: Use Current Pricing (A type of pricing behavior that directly associates the price per unit for a product with the price listed in the product catalog. If a price changes in the product catalog, the unit price changes in any open invoices or orders.)

pricing method (The approach that determines what amount will be charged for an item in the product catalog. You can choose to use the prices defined in the product catalog or you can override the default prices with a specific amount or a percentage.)

primary unit (The measurement used to define the most commonly sold unit of a product.)
See also: base unit (The initial measurement of a product. A unit group contains the lowest unit of measurement in which a product is available, such as a liter. It then lists all the different increments that this base unit is packaged in for sale, and indicates which one is the primary unit.), unit group (A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter bottle. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.)

privilege (A user's right to perform a specific action on a specific record type or to perform a task. Privileges are assigned by system administrators to security roles. Users are then assigned security roles. Examples of privileges include Update Account and Publish Customizations.)
See also: security role (A defined set of privileges. The security role assigned to a user determines which tasks the user can perform and which parts of the user interface the user can view. All users must be assigned at least one security role in order to access the system.)

probability (The likelihood of something happening. For example, the probability of a sale being made.)

product (An item in the product catalog. Products can be linked to other records, such as quotes, campaigns, and cases.)
See also: discount list (A group of price reductions that can be applied to a product, based on volume purchased. Discount lists can be added to price list items in a product.), price list (A group of the specific prices that can be charged for each unit in the unit group of a product. Price lists are used to determine the pricing in a quote for a customer. A default price list can be added to a product.), unit group (A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter bottle. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.)

product catalog (A compilation of all products that are available for sale.)
See also: discount (A reduction in the selling price of products or services. Discounts are usually offered by the seller when the buyer agrees to meet specific conditions.), kit (A group of finished items that compose a set. In Microsoft Dynamics CRM, a kit is comprised of a set of products in the product catalog.),

Q

qualify (To verify that a record fits specific criteria and should be converted to an opportunity, account, or contact, or be added to a marketing list.)

query relational operator (Part of an expression (for example "is equal to" or "contains") that defines how a specified attribute should be compared with a value.)
See also: logical operator (An element of logic that affects the outcome of a logical expression. Examples of logical operators include **Equals** and **Contains**. In Microsoft Dynamics CRM, logical operators are used in Advanced Find queries, as well as in workflow conditions and dynamic values.)

queue (A holding container for activities that need to be completed. There are queues that contain cases and activities in the Workplace, and queues of articles in the knowledge base.)
See also: Workplace (A pane in the Navigation Pane that contains the work a user has been assigned, is currently working on, and is available in queues to which the user has access. Users can accept, assign, and delete assignments from here. Users can also access their calendars and the knowledge base.)

quick campaign (A communication method that creates a single activity for distribution to a group of marketing lists, accounts, contacts, or leads. Contrast with campaigns, which support end-to-end marketing programs that have multiple activities.)

quote (A formal offer for products or services, proposed at specific prices and related payment terms, which is sent to an opportunity, account, or contact.)
See also: invoice (An order that has been billed. An invoice is also a record of a sale to a customer, including details about the products or services purchased.), order (A confirmed request for delivery of goods or services based on specified terms. An order is a quote that has been accepted by a customer.)

R

record (An entry in the Microsoft Dynamics CRM database that stores all the information about a specific item, such as a contact. Records are like individual index cards in an index-card filing system. You can view basic information about records in a list, and you can view or change detailed information about records in a form.)
See also: form (A page that displays detailed information that users have entered into Microsoft Dynamics CRM about a specific record, such as all information about a contact. Information that users enter in a form is stored in Microsoft Dynamics CRM as a record.), list (The summary view for a group of records, such as accounts or contacts, or the result of an Advanced Find query. You can view detailed information about a record by opening the form for the record.)

record type (A group of records. For example, all account records are grouped as the Account record type. Also called an entity.)
See also: entity (A structure used to manage data. Microsoft Dynamics CRM entities include Account, Case, and Activity.), related entity (An entity that is associated with a primary entity (record type) through a unique reference defined by using a lookup control on the related entity form. For example, an account has a unique reference to a primary contact.)

referential (A relationship between two entities in which you can navigate to any related records, but actions taken on one will not affect the other.)
See also: configurable cascade (A relationship between parent and child entities in which any action taken on a parent entity record can also be applied to any child entity records that are related to the parent entity record. You can define the behavior for each type of action. For example, you can set it up so that if you share a record in the parent entity, any related records for the child entity are not automatically shared. But if you delete a parent entity record, any related child entity records are automatically deleted.), parental (A relationship between entities in which any action taken on a record of the parent entity is also taken on any child entity records that are related to the parent entity record. For example, if you delete a record in the parent entity, the related child entity records are also deleted; or if you share a parent entity record, the related records from the child entity are also shared.), referential, restrict delete (A relationship between two entities in which you can navigate to any related records. Actions taken on the parent

record will not be applied to the child record, but the parent record cannot be deleted while the child record exists. However, you cannot delete a record when related records exist.)

referential, restrict delete (A relationship between two entities in which you can navigate to any related records. Actions taken on the parent record will not be applied to the child record, but the parent record cannot be deleted while the child record exists. However, you cannot delete a record when related records exist.)
See also: configurable cascade (A relationship between parent and child entities in which any action taken on a parent entity record can also be applied to any child entity records that are related to the parent entity record. You can define the behavior for each type of action. For example, you can set it up so that if you share a record in the parent entity, any related records for the child entity are not automatically shared. But if you delete a parent entity record, any related child entity records are automatically deleted.), parental (A relationship between entities in which any action taken on a record of the parent entity is also taken on any child entity records that are related to the parent entity record. For example, if you delete a record in the parent entity, the related child entity records are also deleted; or if you share a parent entity record, the related records from the child entity are also shared.), referential (A relationship between two entities in which you can navigate to any related records, but actions taken on one will not affect the other.)

relationship role (A definition of one side of a business relationship between accounts, opportunities, or contacts.)

resource (A user that performs a service, or the equipment or facility that is required for a service.)
See also: equipment (The tools or assets used to perform a service activity.), facility (A physical space, such as a conference room or service bay, where a service activity can be performed.), service (A type of work performed for a customer by one or more resources. Services are schedulable activities.), user (A person who has an active user account in Microsoft Dynamics CRM.)

resource group (Two or more resources (users, facilities, or equipment) that can be scheduled interchangeably.)

S

sales forecast (An estimate of sales revenue that typically spans a specific period, such as a month, quarter of a year, one half of a year, or a full year. Sales forecasts are determined by information that is derived from opportunity records.)

sales literature (The documents that are created with specific information about products or services and given to customers to help increase sales.)
See also: competitor (A company or organization that might compete for sales opportunities with your business unit. Competitor records can be linked to opportunity, product, and sales literature records so that they are available when you are competing for a sale.), product (An item in the product catalog. Products can be linked to other records, such as quotes, campaigns, and cases.)

sales quota (A revenue objective specified as a monetary amount that has been assigned to a salesperson for a specified fiscal period.)
See also: fiscal year (A span of time during which the financial activities of an organization are calculated. A fiscal year is divided into fiscal periods, typically defined as semesters, quarters, or months. The organization determines the dates that begin and end its fiscal year, which may not correspond to a traditional calendar year.)

sales territory (A segment of an organization's market that is assigned to a salesperson or a group of salespeople.)

saved view (An Advanced Find search that has been saved. Saved views are personal views that appear in the **View** lists for the record types they are searching on. With saved views, you can save the criteria of a search to use again later. You can also share your saved views with others.)
See also: Advanced Find (A tool used to search for specific records and activities.), view (A filter applied to a list of records. Users can choose different views that contain all the records or activities of a particular type or that are a

subset of that type.)

schedule (A list of times that a resource is available for work. Also, a list of service activities for a specific period of time.)
See also: service activity (A schedulable appointment to provide a service to a customer. A service activity uses one or more resources to perform a service at a specific time and place.)

security role (A defined set of privileges. The security role assigned to a user determines which tasks the user can perform and which parts of the user interface the user can view. All users must be assigned at least one security role in order to access the system.)
See also: access level (A security role setting that determines, for a given entity, who can access records. There are four options: just the owner of the record, all users in the current business unit, all users in the current or child business unit, or all users.), privilege (A user's right to perform a specific action on a specific record type or to perform a task. Privileges are assigned by system administrators to security roles. Users are then assigned security roles. Examples of privileges include Update Account and Publish Customizations.)

selection rule (A set of criteria that specifies which personnel, equipment, facilities, or resource groups are required to perform a service, or how to select these resources, based on parameters like quantity and capacity.)

service activity (A schedulable appointment to provide a service to a customer. A service activity uses one or more resources to perform a service at a specific time and place.)
See also: appointment (An activity represented by a time interval that has a start time, an end time, and a duration. An appointment does not include a service or check for conflicts, and you cannot search for available times.), service (A type of work performed for a customer by one or more resources. Services are schedulable activities.)

service coverage (The specific hours and days of the week for which service support will be provided. This is defined in the contract template, but is not enforced by the system.)
See also: allotment type (A unit of service, such as a case or a range of coverage dates, specified in a service contract that indicates how much access a customer has to customer service.), billing frequency (A pre-defined period of time that specifies how often a customer should be billed. Common billing frequencies are monthly, quarterly, and annually.), contract line (A line item in a contract that describes the service support to be provided. A contract line often includes pricing information and how support will be allotted.)

service level (The type of service specified in a contract. The default levels are gold, silver, or bronze. Like medals in a competition, gold denotes the highest level of service and bronze the lowest. The organization determines what each service level offers. Some common differentiations between levels include response time and access to specialists.)

service restriction (A limitation of when a resource can perform a specific service.)

share (To allow another user or team to have a specified amount of access to a record, such as a case, account, or contract. For example, you can share an account with a team and specify that its members can read the account record, but cannot have write access to it.)
See also: assign (To specify the owner of a record, such as an account or case, or an activity, such as an e-mail message or phone call. Users can assign cases and activities to either a user or a queue.)

SIC Code (Standard Industrial Classification code. A four-digit number assigned by the U.S. government to designate the economic activity of a business.)

site (A business location to which resources are assigned. A site is used to ensure that all resources required for a service are in the same physical location.)

Site Map (An XML representation of the structure of the Navigation Pane in Microsoft Dynamics CRM, including the areas, groups, and subareas where entities are displayed, and the privileges associated with each subarea.)

See also: Navigation Pane (The column on the left side of Microsoft Dynamics CRM that includes panes, such as **Workplace** and **Marketing**, and the categories within each pane. Click a category under the pane to show the items in the list.)

snapshot (A static file that contains the results of a report that was run at a particular time.)

snapshot definition (A collection of settings required to produce a snapshot, including user credentials, filter criteria, parameters, and schedule information.)

status (The state of a record or activity. For example, a case can be Active or Resolved, and an e-mail activity can have a status of Draft or Sent. Status is also used by workflow rules to determine when to move to the next stage in a workflow or sales process.)
See also: status reason (The description of the status of a record or activity. For example, if a case has a status of Active, the status reason could be Researching or Waiting for Details. The options available are based on what type of record is open and the status of the record. When the status of a record changes, if more than one status reason is possible, a dialog box is displayed to enable the user to select the appropriate status reason.), workflow rule (A set of action steps in a business process or sales process. Workflow rules determine the required activities for a workflow and the order in which those activities must be performed.)

status reason (The description of the status of a record or activity. For example, if a case has a status of Active, the status reason could be Researching or Waiting for Details. The options available are based on what type of record is open and the status of the record. When the status of a record changes, if more than one status reason is possible, a dialog box is displayed to enable the user to select the appropriate status reason.)
See also: status (The state of a record or activity. For example, a case can be Active or Resolved, and an e-mail activity can have a status of Draft or Sent. Status is also used by workflow rules to determine when to move to the next stage in a workflow or sales process.)

subordinate record (The record that is deactivated when records are merged. Data from the subordinate record is added to the master record.)
See also: master record (The record that stays active when records are merged. Data from the subordinate record is added to this record.)

synchronization (The exchange of data between a user's local data and the Microsoft Dynamics CRM database so that the data is the same.)

system attribute (An attribute that is included in Microsoft Dynamics CRM by default. For example, the **name** attribute in the Account entity is a system attribute.)
See also: custom attribute (An attribute that is not included in Microsoft Dynamics CRM by default. Instead, a customer or partner adds it after they install the software, to help adapt the software to the customer's needs.)

system entity (An entity that is included in Microsoft Dynamics CRM by default, such as Account.)
See also: custom entity (An entity that is not included in Microsoft Dynamics CRM by default. You can create custom entities by using the customization tools.), entity (A structure used to manage data. Microsoft Dynamics CRM entities include Account, Case, and Activity.), related entity (An entity that is associated with a primary entity (record type) through a unique reference defined by using a lookup control on the related entity form. For example, an account has a unique reference to a primary contact.)

system job (A process that Microsoft Dynamics CRM performs independently or in the background. Other processes can be started before a system job has finished. Examples of system jobs include workflow jobs and duplicate detection jobs.)
See also: workflow job (A type of system job that performs the actions defined in a workflow on a specific record.)

T

team (A group of users who share and collaborate on business records. A team can consist of members who all report to one business unit or members who report to different business units.)
See also: share (To allow another user or team to have a specified amount of access to a record, such as a case, account, or contract. For example, you can share an account with a team and specify that its members can read the account record, but cannot have write access to it.)

template (A framework for an e-mail message, contract, or article. Templates are used to ensure consistent layouts and content in similar types of documents.)

ticker symbol (An identification code used to identify a publicly traded corporation on a particular stock market.)

timeout (A type of wait condition in workflow logic that stops all actions in the workflow until a specified time. You can create a timeout by selecting the following values for the wait condition: **Workflow** (under **Local Values**), **Timeout**, **Equals**, and a date or specific time.)

track (To link between a record in Microsoft Dynamics CRM and Microsoft Office Outlook. Records that are marked for tracking are updated in both applications, including creating new activities.)

transform (To concatenate multiple columns, split a column, replace a string, use a substring, or modify a date while migrating data.)

U

unit (A measurement that specifies in what quantity a product will be sold.)
See also: base unit (The initial measurement of a product. A unit group contains the lowest unit of measurement in which a product is available, such as a liter. It then lists all the different increments that this base unit is packaged in for sale, and indicates which one is the primary unit.), primary unit (The measurement used to define the most commonly sold unit of a product.), unit group (A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter bottle. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.)

unit group (A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter bottle. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.)
See also: base unit (The initial measurement of a product. A unit group contains the lowest unit of measurement in which a product is available, such as a liter. It then lists all the different increments that this base unit is packaged in for sale, and indicates which one is the primary unit.), discount list (A group of price reductions that can be applied to a product, based on volume purchased. Discount lists can be added to price list items in a product.), price list (A group of the specific prices that can be charged for each unit in the unit group of a product. Price lists are used to determine the pricing in a quote for a customer. A default price list can be added to a product.), primary unit (The measurement used to define the most commonly sold unit of a product.), product (An item in the product catalog. Products can be linked to other records, such as quotes, campaigns, and cases.), unit (A measurement that specifies in what quantity a product will be sold.), unit group (A compilation of the different measurements that a product is available in. A unit group contains the base unit in which a product is available, for example, a two-liter bottle. It then lists all the different increments that this base unit is packaged in for sale, such as an individual two-liter bottle or a case of 6 two-liter bottles, and also indicates which measurement is the primary unit.)

Use Current Pricing (A type of pricing behavior that directly associates the price per unit for a product with the price listed in the product catalog. If a price changes in the product catalog, the unit price changes in any open invoices or orders.)

See also: Prices Locked (A type of pricing behavior that prevents changes to the price per unit for products in open orders or invoices. Even if a price changes in the product catalog, the original price will remain for any open orders or invoices in which Prices Locked has been enabled.)

user (A person who has an active user account in Microsoft Dynamics CRM.)
See also: resource (A user that performs a service, or the equipment or facility that is required for a service.)

v

view (A filter applied to a list of records. Users can choose different views that contain all the records or activities of a particular type or that are a subset of that type.)
See also: associated view (The view of an entity that is displayed in the forms of other entities. The associated view is different from the views that are visible for the entity in its own area of the user interface. For example, in an account record, under **Details**, you can click **Contacts** to view and open a contact form. That is the Contacts associated view. There can be only one associated view of each entity.), Index (The dynamic alphabet bar located on the bottom of the lists in the Microsoft Dynamics CRM application window. When a letter or the number sign (#) is clicked, the list displays the available records by that letter.), form (A page that displays detailed information that users have entered into Microsoft Dynamics CRM about a specific record, such as all information about a contact. Information that users enter in a form is stored in Microsoft Dynamics CRM as a record.), list (The summary view for a group of records, such as accounts or contacts, or the result of an Advanced Find query. You can view detailed information about a record by opening the form for the record.), record (An entry in the Microsoft Dynamics CRM database that stores all the information about a specific item, such as a contact. Records are like individual index cards in an index-card filing system. You can view basic information about records in a list, and you can view or change detailed information about records in a form.)

volume discount (The amount subtracted from the unit of a product or service based on the volume purchased.)
See also: discount list (A group of price reductions that can be applied to a product, based on volume purchased. Discount lists can be added to price list items in a product.), manual discount (The amount subtracted from the set price of a product or service.)

w

wait condition (An element of workflow logic that enables a workflow to pause itself until the criteria defined by the condition have been met. The workflow starts again automatically when the criteria in the wait condition have been met.)

work hours (The times that a user is available to be scheduled for appointments and service activities. This includes start and end times, breaks, and time off.)

workflow (A set of logical rules that define the steps necessary to automate a specific business process, task, or set of actions to be performed on Microsoft Dynamics CRM records.)

workflow actions (Elements of workflow logic that specify the actions that should be performed by workflow jobs when conditions defined in the workflow have been met.)

workflow job (A type of system job that performs the actions defined in a workflow on a specific record.)
See also: system job (A process that Microsoft Dynamics CRM performs independently or in the background. Other processes can be started before a system job has finished. Examples of system jobs include workflow jobs and duplicate detection jobs.)

workflow logic (All of the conditions, actions, and other logical elements that define when and how a particular workflow takes action on Microsoft Dynamics CRM records.)

workflow scope (The range of records that a particular workflow is allowed to take action on. The options available when you specify the scope of a workflow depend on the access level that you have on your workflow's primary entity. Workflow jobs started by your workflow will not take action on records owned at a higher access level than your access level.)

workflow stage (An element of workflow logic that groups steps. Adding stages to a workflow does not affect how the steps function. Stages are purely for conceptual grouping of steps within complex workflows.)

workflow step (An element of workflow logic that defines a unit of business logic within a workflow. Steps can include conditions, actions, other steps, or a combination of these elements.)

workflow template (A type of workflow that serves exclusively as the basis for creating other workflows. Workflow templates cannot start workflow jobs.)

Workplace (A pane in the Navigation Pane that contains the work a user has been assigned, is currently working on, and is available in queues to which the user has access. Users can accept, assign, and delete assignments from here. Users can also access their calendars and the knowledge base.)

X

Y

Z